

# Qualification

So far we understand that we need a Minimum Viable Offer to start iterating on as you enhance your skillset. Our hope is to develop a system and curriculum that can be turned into a fleshed out consulting program, potential cohort, and potential digital product.



Next, we know that we can DM people that interact with your content to land potential clients or just help them out in exchange for a testimonial and practice.

Now we can start adding to this process to make it more efficient.

Qualification, in a nutshell, does a few things:

- It acts as a barrier to working with you. You don't want to waste 30-60 minutes of your time on a call with somebody you *know* isn't going to buy. Tire kickers are real.
- It helps make people understand their own problems further. Your qualification form can act as a way to raise their awareness level in the middle of the sales process. (Most people don't treat it this way).
- When done well, it lowers the friction of expressing interest in working with you. Going straight to a call can be intimidating.

I want you to think of the qualification form as *another* sales process *within* the bigger sales process.

A great qualification form makes the prospect uncover what their problem actually is through careful questioning.

Where do you use this qualification — or “intake” — form?

You can use it:

- In your bio link to capture leads that are interested in working 1-1 with you (instead of your Calendly link or something else that goes *directly* for the sale.)



- Linked to or embedded in a landing page for your services or on your website (not necessary to have right now, just letting you know).
- Plugged at the end of your Twitter threads, under your tweets, in your newsletters, or in any other post.



In a nutshell, it is much lower friction and intimidating to tell someone to “Fill out this quick form to see if I can help you” instead of “Here’s my calendar, pick a time and we can talk about signing you on as a client.”

There are a few options to consider, but we will talking about “The Automated Method” throughout this course since that applies best to those building an audience.

**The Traditional Method:** Calendar link with qualifying questions.

- **Downside** - you don't have much control over who schedules a call (you don't know if they can afford your services BEFORE the call is scheduled). It is high friction and doesn't allow much space for authentic answers to your qualifying questions.
- **Upside** - good for those that are under \$10K per month and are going for sheer volume of calls from inbound / outbound DMs (don't have a built out funnel with consistent leads). If you are just offering help at the start, you can go this route.

**The Gym Salesman Method:** Intake form > call the prospect > close them or schedule another call

- **Downside** - the prospect may not answer the phone and you will have to follow up to schedule a call. You have to CALL while the lead is hot - within 15-30 minutes after they fill out the form. Some people don't have that flexibility.
- **Upside** - you can close the deals quickly.


**The Automated Method:** Intake form > information gets put into a Google sheet > you or a commission-based closer can call them or DM them.

- **Downside** - you will need a consistent flow of leads from your social media audience / other promotional channels.
- **Upside** - You can DM them, form a connection, run them through a sales process to qualify further, and THEN send them your calendar to schedule a call. (Sometimes you



can just close them in the DMs if you have high authority.) If you have a closer, it is hands-off.

## Your Intake Form

An "intake form" is just a fancy way of saying qualifying questionnaire. It will have qualifying questions and everything you need to DM them, qualify them further, and have the information you need before you get on a call with them. 

You will need 2 things: a calendar (with form functionality) AND a form software that will come before the calendar when you are speaking to prospects as we discussed earlier.

- **Calendly (free + paid)** - You will absolutely need a Calendly account. You will have to upgrade to add more questions and have more flexibility. You will need this whether you have a separate intake form or not.
- **JotForm (free)** - You can create your intake form here for free and get email notifications for new leads. (Downside: I don't like the design of the forms).
- **TypeForm (free + paid)** - A great-looking form with a lot of customizability and automation features.
- Recommended for beginners: **Google Forms (free)** - A classic solution that can pair with Google Sheets to capture your lead information.

As with all of this, and being reminded of Intelligent Imitation, you should be studying the funnels of your mentors and others you find online. They may or may not have a better or worse way of doing things, but this is how you learn... through real-world experience and discovery.

If you chose to use Google Forms, here are some of the questions you would include.

In the description section of your form, you can add something as simple as:

*"I need to learn more about your unique situation before I know I can help you with [your interest]. If I can help you, I will reach out to you with a few more questions."*

Here are some tried and true options for qualifying questions you can add to your form:



- First name, email, phone number, and social media handle (all separate questions, the basics)
- What do you do for work? (soft qualification, you can judge their income)
- What is your motivation behind wanting X? (X = the result / service you offer them)
- What is your current [state]? (where they are now in relation to your service)
  - For marketing services - [state] = current monthly revenue
  - For fitness coaching - [state] = fitness starting point
  - For performance coaching - [state] = revenue or mental state
- What is your target [state]? (where they want to be through your service)
- Where would you like to see exponential improvement? (multiple choice with different aspects of what you offer)
- What are you struggling the most in that area? (relating to the question above)
- How long have you been trying to get X results?
- On a scale of 1-10 how serious are you about getting X results?
- If we decide you are a fit — will you be ready to move forward on the call? Or do you need someone else's approval?
  - Bonus if you are getting qualified leads consistently - enter the price range of your services.
  - "Our services range from \$1000-\$5000. If we decide you are a fit for one of our packages - will you be ready to move forward on the call? ..."



If you remember the DM script - we are literally asking the same questions. We are helping them dive deeper into what they want and understanding that they need something to help them get there. It is OK to repeat these questions - if not necessary.

## Personally Reach Out

Once they have filled out your intake form you can email, call, or DM them. I would recommend DMing them as you can do it on your own time and it is more personal.



Ask them:

*"Yo my friend! I got the questionnaire you filled out for X. One more question for you, what made you fill out the questionnaire? Where do you want to take this project?"*



You can go on to ask more qualifying questions if you are iffy about them, but if you are just starting out, get on calls and offer value to everyone.

Again, you are walking them through another sales process and making them more aware of their problem. Or, you are helping them make themselves more aware of their problem.

Why are we doing this as opposed to just having a landing page with pricing?

Because if you don't have a large audience (a lot of traffic) you need more time to build trust. The sales process needs to be deconstructed and drawn out more than a static landing page. There needs to be a deeper connection when it comes to someone purchasing higher-cost services.

Could you just make a landing page and sell from there? Yes. But this puts you in full control of how much money you make depending on how many people you connect with. Once you are at a steady income, you can then start to productize, decrease the amount of time you spend prospecting, and reap the time-saving benefits of building an audience. This phase could last 6 months, 1 year, or 5 years depending on how adamant you are on winning your time back.

If you plan on creating a cohort or higher ticket course instead of a consulting offer at the start, you can also use this process to get customers if you don't have a large audience.

When they respond to your DM, acknowledge their response and ask questions as necessary. When you determine that you can actually help them, ask them if they want to schedule a call to hear more about your offer and how you can solve X problem for them.

## Calendar With Additional Information

By now you should have your Calendly account set up. Create a specific "event" for your calls and title it "Strategy Call" (or discovery / clarity call... doesn't really matter what it's called, just don't call it a sales call. Bad vibes.)

[If you want to swipe my description + questions, you can here.](#)



Again, this will have fewer, but more questions for them to answer. All of these questions will make them feel some form of investment before they even work with you. You are reminding them of what they want.

Some of these may be repeat questions (which is important) but we want to dive deeper and see if they are actually a fit (financially and mentally).



1. In 90 days from now what results would you like to see in your [fitness, business, relationships, skill level]?
2. Be honest... what is holding you back from getting there?
3. If I can help you get X result, what would you want your [fitness, business, relationship, skill level] to look like after working with me? Paint me a picture.
4. (Optional) The tiers of this [service] start at \$X. Are you in the financial position to invest that into solving X problem right now?

These will give you a good idea if you need to reach out and just pitch from the DMs or accept the call.

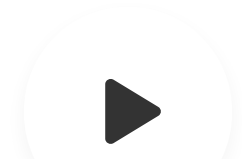
*I used Kartra to create this qualification questionnaire in the video, but I don't use them anymore. I usually use either Typeform or simple Google Forms for this. Don't overcomplicate it.*



# Do You Qualify For The Mastery Program? - 27 July 2022



🕒 17 min



Ideating & Outlining A Project

Getting Started With Marketing

More Marketing Firepower

The Godfather Offer

Action Steps



Module 7

## **Making A Living Without Followers**

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The Sales Process

Conversational DMs

High Ticket Outreach

Qualification

Conversational Sales Call

Onboarding & Offboarding



Module 8