



Claim It! Declare It!

Session #1

Workbook

Purpose of this course:

1. Make more money in your business with your skills and gifts
2. Become more confident in delivering your sales conversations
3. Have a greater understanding of the numbers you need to reach to accomplish your monthly financial goals
4. Have a greater understanding of the bottom line measurable results that your services bring to your ideal clients
5. Have additional Intuition skills with which to make Soul Aligned decisions, identify priority actions, identify priority timing by when to take your actions, identify best business strategies to meet your goals and with which to design products and services to best fulfill your clients' needs
6. Have a better understanding of how to use your time for best business development
7. Increase your confidence in pursuing leads to invite them into have a client enrollment sales conversation with you



Know Your Business Operations Related Numbers

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My Income Goal: \$ _____

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My Monthly Rate: \$ _____

Number of Clients I Need: _____

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Number of Clients I Currently Have: _____

Number of Clients I Need to Book: _____

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My Conversion Rate = _____ %

Number of Sales Conversations I Need to Book: _____

Real Life Multiplier : x3

(Figure 1 out of every 3 people I ask for a sales call will accept the invitation.)

Number of Invitations to a
Sales Conversation I Need This Month: _____



My Numbers Tracking Board

120 and 90 DAY PLAN

Blue Sky

MONTHLY

MONDAY TUESDAY WEDNESDAY THURSDAY FRIDAY SATURDAY SUNDAY

\$5,000.00

1,000

1,000

1,000

ASKS

Monthly Numbers

Sales Calls

MONTHLY

MONDAY TUESDAY

1. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

2. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

3. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

4. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

5. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

6. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

7. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

8. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

9. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

10. XXXXXXXXXXXXXXXXXXXXXXXXXXXX

My Target Numbers

Revenue: \$5,000.00

Profit: \$1,200.00

Number of Sales Calls: 9

Number of Sales Calls per Day: 9

Number of Sales Calls per Week: 90

Number of Sales Calls per Month: 270

90 Day Plan

1. 0000000000/100

2. 0000000000

3. 0000000000

4. 0000000000

5. 0000000000

6. 0000000000

7. 0000000000

8. 0000000000

9. 0000000000



Inviting People To Have A Strategy Session With You

Scripts For An Appropriate "Ask" by James Roche:

- "If you are struggling with this problem, I can help you. Let's get on the phone and identify the one key issue (one area, one problem) that will get you started and let's look at how I might be able to support you moving forward."

They respond "Great"

You continue: "Let's set up a time right now to schedule that call so that we can have that conversation."

- Alternative:

"If you are struggling with _____, I can help you. Let's get on the phone and Let's identify the one big idea that would accomplish _____ that will get you started and let's look at how I might be able to support you moving forward."

Never a free coaching call:

"This is not a free coaching call. We are going to do a high level analysis of what is happening with you. We'll look at where things can potentially go for you. We'll explore a high level plan for you. And, if I can help you, we'll talk about it. If it isn't a fit, that's OK. Let's still connect. It's free."



