LESSON 5

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STEP ½
PRE-QUALIFICATION

Overview

Pre-qualification is that initial conversation you have with a prospect to determine if they're the right fit for you. It's a chance for them to determine if you're the right fit for them before you schedule a consultation.

The two most important things we need to get out of this entire pre-qualification process are: 1) to make sure the person coming in for a consultation can afford your services, and 2) they're empowered to decide to buy.

Doing pre-qualification the right way gives you the best chance of making a sale because it's going to set up a great experience for that prospect from day one.

Outcomes

- Understand the importance of Pre-Qualification.
- Customize the script to fit your business.

Growth Questions

- Why is pre-qualifying important?
- What description of your program will you use in your Pre-Qualification script?
- What monthly range of prices will you use?
- What are two things your prospect must have to benefit from a consultation with you?

Action Steps

- Customize your pre-qualification script.
- Role-play your pre-qualification script until you can recite it from memory.
- Begin using the pre-qualification script immediately.

> We talk to clients all the time and they tell us that after implementing pre-qualification, not only did their close rate go up, but their retention rate went up as well because they're delivering a phenomenal experience from the first interaction.
>
> — ***Sean Greeley***

We're diving into Step ½: Pre-qualification.

We'll cover what it is, why it's important and how to do it.

We'll even provide you with a script you can use immediately after this lesson.

Pre-qualification is your first contact with any prospect who's interested in learning more about your business.

Before we go into more detail on step ½, let's list the others:

1. Rapport
2. Probing and Discovery Questions
3. Identifying Needs
4. Building the Problem
5. Presenting the Solution
6. Closing the Sale
7. Objection Handling

The goal is to get so good at the first six and a half steps that you don't need to worry about objection handling.

But we're going to teach you how to do it anyway because there will be times where you need to overcome some objections.

Every step builds upon the previous step.

That means if we don't prequalify the correct way, it makes it more difficult to build rapport and so on.

Pre-Qualification

Pre-qualification is that initial conversation you have with a prospect to determine if they're the right fit for you. It's a chance for them to determine if you're the right fit for them before you schedule a consultation.

Why is this important?

Time is money. Literally.

As a small business owner, your most valuable asset is your time. You must protect your time. And when you're in the services industry, time IS the asset you sell.

Every time you give time away, you're missing the opportunity to invest that time elsewhere.

And time equals money.

Ultimately, it's wasteful to invest your time, and disrespectful to a prospect to waste theirs.

Pre-Qualification Outcomes

The two most important things we need to get out of this entire pre-qualification process are to make sure the person you're meeting with for a consultation:

- Can afford your services (it's in their budget)
- Can make a buying decision.

Pre-qualifying the right way gives you the best chance of making a sale because it's going to set up a great experience for that prospect from day one.

We talk to clients all the time and they tell us that after implementing pre-qualification, not only did their close rate go up, but their retention rate went up as well because they're delivering a phenomenal experience from the first interaction.

We've all been on the consumer end of this. You call or email a business, and then you don't hear anything back, or what you do hear back is less than professional.

Or they don't provide all the information you need.

Or they don't give you a clear direction of what to do next to pursue a relationship with that business.

If you do pre-qualification the right way:

- you're going to present a professional appearance to all prospects
- you're going to clearly give them the information they need to take the next step
- you're going to clearly tell them what the next step is, which is (in your case) to schedule a consultation.

Components of Pre-qualification

Get to know a little bit about your prospect. You're going to do that by asking two open-ended questions:

- "Tell me a little bit about yourself and your fitness goals." This gives your prospect the opportunity to tell you what they're looking to get out of a fitness program.
- "Are you exercising or following any type of a fitness program right now?" That's the barebones minimum we need in terms of information from a prospect at pre-qualification.

Once we get that information, we're going to help the prospect understand, as briefly as possible, that we can help them solve their problems and achieve their goals.

This part of the script, as you'll see, needs to be customized to your business and your service offerings.

Let them know that you understand what they've told you in terms of their fitness goals, and you are positioned to help them with the right programs.

This is NOT your opportunity to sell them on how great you are.

This is NOT your opportunity to sell them into a membership with your business.

This is your chance to let them know, "Yes, I've heard what you said and I can absolutely help you solve those problems. In fact, here is how we do that."

Next, directly ask them if they can afford your services.

Let's take a moment to pause and refresh on a previous lesson. The entire goal of prequalifying is to get qualified consultations scheduled.

Your goal = schedule qualified consultations.

At this point in your journey you should have a minimum of one to two hours per day blocked off to do these consultations. This is where the goal is to schedule those qualified consultations and fill up those slots.

Let's continue.

Set the prospect's mindset for deciding.

You want the prospect to be very clear that they're not coming into your business to simply learn a little bit about it. They're not coming in for a tour.

They're coming in to decide, either yes or no. Either one is fine, but they're going to decide about committing to their goals and to one of your programs. We'll talk through the script on exactly how to do that.

Empowered to Decide

Finally, we want to make sure that they are empowered to decide.

Beyond price, the number one objection is, "I have to go home and talk to my significant other."

We want to address this in the pre-qualification process to make sure that they're empowered to decide. We're going to do this is very delicately.

If you're talking to a man on the phone, you don't ever want to imply that he can't decide without his wife. The same thing if you're talking to a wife. You don't ever want to imply that she is not empowered to decide.

The way you frame this is very important. We'll talk through this more as we break down the script.

The Pre-qualification Script

Let's get into the pre-qualification script. Here's one perspective:

"Hey, this is Sean from XYZ Fitness returning your call regarding our personal training program. Have I reached you at a good time? Great! First, I'd love it if you could tell me a little bit about yourself and your fitness goals. Fantastic! Are you exercising or following any type of fitness program right now? Great! I appreciate you sharing that with me. I'd love to give you a little bit more information about how we work with our clients.

"Currently, we offer complete 12-week programs in which we cover everything you need to know to get the best results possible from your fitness program. This means we spend a lot of time working with our clients on both the nutrition and the exercise components that are required for achieving serious results. We have clients who come in just for program design and then follow through with their programs on their own, either at home or in the gym.

"We also have clients who meet with us anywhere from three to four times per week, depending upon their goals, motivation and budget. But all our programs generally require a 12-week initial commitment. The investment runs anywhere from 400 to 800 per month, depending upon which option you choose and what's best for you. Is that in your budget?"

"Okay, great! Well, the next step then is to schedule your consultation. Consultations generally take 30 to 45 minutes, and my next available appointments are Monday at 4:00pm or Tuesday at 5:00pm. Which works best for you? Great! During our consultation, I'm going to ask you some more questions. We're going to review your goals in more detail, and then, if we have a good fit, I'm going to present our different program options to you.

"If you like what we offer, I'll ask you to make a decision about committing to your goals and to one of our programs. You can answer either yes or no and either answer is okay. Is that all right with you? Great! Before we go, I just want to share with you that when many of our current clients were deciding on working with us, they preferred to review the information with their spouse or family member before committing to a program.

"Frankly, Jim, we encourage that because having a good support system at home is important to making a lifetime commitment to your health and fitness goals. May I ask, if you do like our programs and we do have a good fit, is there anyone else involved in the decision of you joining our programs? No? Okay, great. Well, then I look forward to speaking with you on Monday at 4:00pm."

There you have it: the pre-qualification script.

The Pre-qualification Script Dissected

Now let's highlight a few points.

We talked about these first two questions: "Tell me a little bit about yourself and your fitness goals," and, "Are you exercising or following any type of fitness program right now?"

We want to get the general idea of what our prospects are looking for. We don't want to ask any deeper questions. We don't need to know that information yet. That's going to come out during the consultation process.

Then when you go in and tell the prospect more about how you work with clients, you are NOT selling.

Again, this is very general about how we work with clients, letting them know that, yes, you can absolutely help them achieve their goals.

Then you give a range of prices. "The investment runs anywhere from 400 to 800 per month, depending upon which option you choose and what's best for you."

Since you already established the correct pricing and packaging in a previous lesson, now you can use those numbers for your pre-qualification script.

Then ask, "Is that in your budget?"

If they say, "Yes," continue to prequalify.

If they say, "No," take their information and ask them what monthly commitment they had in mind.

If you're prequalifying for personal training, there's a chance that maybe they're a better fit for your group classes at a lower price point.

If it's not a good fit, that's fine.

Simply get their information, let them know that you'll continue to be in touch with different educational pieces, different offers, and wish them the best of luck on their journey.

Let's assume they said yes, we're going to move forward.

Now you schedule a consultation.

You're not going to ask the prospect, "When would you like to come in?"

That implies a couple of things.

First, it implies that you're just sitting around and that you're not busy. You always want to be busy. If you're busy and you have limited time on the schedule, that implies to the prospect that you're a professional organization and you're servicing a lot of clients.

Think about when you call your doctor or your dentist to get an appointment. They don't ask you what's the most convenient time for you. They give you a couple of options.

That's exactly how you want to do this. You want to give two options to that prospect. If neither of those two options work, let's go back and give two more.

Continue in that manner until you find a time that works for your prospect.

Next, set the mindset to decide. It's very clear: "I'm going to ask you to make a decision about committing to your goals and to one of our programs. You can answer either yes or no. Either answer is okay."

The reason we do this is because, first and foremost, we want to plant the seed in their mind that they're coming in to decide.

We also want to remove the chances that during the consultation, they're going to say, "Oh, I need to go think it over."

If that happens, here's an example reply:

"Jim, I can totally respect that. During our phone conversation, I told you that I was going to ask you to make a commitment and either yes or no was fine, and you said that was okay with you. I'm just going to ask what changed or what did I not present or what questions did I not answer?"

That's the reason we need to plant the seed before the consultation so that we can then address it during the consultation if it comes up again.

Finally, make sure your prospect is empowered to make a buying decision.

We frame it as the prospect needing the support system of their significant other or their friends and family before they make a commitment.

The bottom line is this: Let's say you have a conversation with Jim, and he needs to think it over and talk to his wife about it. It's a significant investment—400 to 800 per month.

Jim cannot go home to his wife Mary and sell Mary on the value of your programs. Only you can do that.

If the prospect is not the person to decide, we want to schedule the consultation so that both parties can be there. This way you're not relying on Mary to go home and sell Jim, and you're not relying on Jim to go home and sell Mary on your programs.

Only you can do that.

Furthermore, you can avoid this situation, which happens quite often with brand new clients.

They're doing absolutely great the first month, they're getting great results and then all of the sudden they stop coming.

You call them and say, "What's going on?"

"Well, I have to be honest. My husband doesn't want us to spend that money anymore," or "My wife says we can use that money elsewhere."

This happens because the significant other—who is not training—didn't have buy-in at the point of sale.

Whenever possible, we love to have anyone involved in that decision at the consultation.

Make sure you address that during pre-qualification.

Just a quick note: pre-qualification is the phone conversation you have with a prospect before you schedule a consultation, but it can also occur if someone walks in off the street.

Go ahead and prequalify them in person right there and schedule a consultation.

That's why, as you'll see in your homework, you need to customize and memorize the script.

Consultation Pre-Qualifying Phone Script

Hi ______________________________ , this is <Your Name> from <Your Company> returning your call regarding our personal training program.

Have I reached you at a good time? Great.

OR if taking inbound calls… "I'm calling about personal training."

Great. Thanks for your call. I'd be glad to help…

Continue…

1. Tell me a little bit about yourself and your fitness goals.

2. Are you exercising or following any type of fitness program right now?

Ok, great. Let me give you a little more information about how we work with our clients.

<Currently we offer complete 12-week programs in which we cover everything you need to know to get the best results possible from your fitness program.

This means we spend a lot of time working with our clients on both the nutrition AND the exercise components required to achieve serious results. We have clients who come for just program design and then follow through with programs on their own (either at home or in the gym). We also have clients who meet with us anywhere from 3–4 times/week depending on their goals, motivation, and budget. (Personalize this with program description.)>

All programs are generally a <12-week initial commitment>. The investment runs anywhere from <400 to 800> per <month (or week in Australia)> depending on which option you choose and what's best for you.

Is that in your budget?

If no, get information and refer on.

If yes, continue to pre-qualify.

Great! The next step is to schedule your consultation. Consultations generally take 30 minutes. My next available appointments are ____________ or ____________ . Which works best for you?

Great. During our consultation, I'll ask you some more questions, we'll review your goals in more detail, and then, if we are a good fit, I'll present our different program options to you. Provided you like what we offer, I'll ask you to make a decision about committing to your goals and one of our programs. You can answer yes or no, and either answer is ok. *(Up-front contract to make a decision, gets rid of think-it-overs.)*

Is that all right with you?

Great!

Before you go, I want to share with you that when many of our current clients were deciding about working with us, they preferred to review the information with their spouse or family member before committing to a program. And frankly, <Prospect Name>, we encourage it because having a good support system at home is important to making a lifetime commitment to your health and fitness goals.

So, may I ask if you like our program and we are a good fit, is there anyone else involved in the decision of you joining our program?

- Yes? Great! Then what we'd really like to do is have ____________ join us for your consultation so we can give you both a good overview of the program. That way you can both have all the information you need to make the best decision for you and ensure success with your program from the start. And, in fact, if ____________ is unable to attend your consultation, then please give us a call to reschedule for a time when you can both be present. Ok?

- No? Great! Then I look forward to speaking with you on ____________ .

Confirm date, time and tell them you look forward to meeting with them.

NOTE: Capture contact info (name, phone, email, mailing address) so you can send a follow-up reminder email with date/time of appointment, directions, and more.