

The Art of The Complimentary Session

The trick with marketing is standing in a space of abundance while asking the universe for more.

Thus the key to marketing is to focus on offering something that inspires you.

What is a complimentary session?

It's a free offering of your service. A complimentary session happens when you sit down either on the phone or in person to deliver a taste of your services to a prospect.

Examples:

- Complimentary coaching session
- Complimentary Strategic Planning Session
- Assessment Review Session

Why would you want to provide a complimentary session?

- It's an opportunity to provide value.
- It's an opportunity to build trust.
- It's an opportunity to align with your customer's buying process.
- It's an opportunity for a prospect to understand what you do.
- It's an opportunity for a prospect to experience why your service is unique.
- It's an opportunity to meet the needs of both the emotional and rational part of the prospect.
- It's an opportunity to give a profound experience that touches the person emotionally.
- It's an opportunity for the prospect to discern whether to enroll your services
- It's an opportunity for you to decide whether YOU want THEM to be your client.
- It's an opportunity for you to practice and gain confidence
- It's an opportunity for you to have fun!!!

Focus On Abundance

Again, *the trick with marketing is standing in a space of abundance while asking the universe for more.*

What better way to feel abundant than to offer something for free? Something free that you can give from your heart?

That's why, from now on, focus all your energy and attention on...

Giving Complimentary Sessions

Versus

Trying To Get Clients

Have a paradigm shift: Don't focus on getting clients, focus on doing Comp Sessions.

As you do this several things will happen:

- You can focus on being of service
- You can focus on what you do best – give your service
- You don't have to think one iota about selling
- You don't have to worry about how people are going to pay
- It takes the pressure off

If you simply focus on securing Complimentary Sessions and work on improving them, you will fill your practice.

This is especially the case when you do them with people who match your well defined target market, and have expressed a desire for your core benefit.

Preparing For Complimentary Sessions

#1 – Decide How Many Complimentary Sessions You'd Like To Do Each Week

To figure this out, start with the end in mind.

- Consider how many clients you currently have in a given month. Write it down.
- Now consider how many clients you would like to have in a given month. Write it down.
- How many clients do you currently have in a given month? Write it down.

- What's the difference? (Desired # Clients minus Current # Clients.) This is the number of **desired new customers** you would like to have.

In order to enroll these new clients, you will need to conduct complimentary sessions. We can probably assume that not 100% of the people you do a complimentary session with, will in fact become your customer. So estimate the approximate percentage of success you have converting a prospect to a customer during a complimentary session.

In general, at the beginning, you might expect a 20-30% conversion rate.

To estimate how many prospects you would need to serve in order to enroll all the new clients you want, refer to the "[How Many Customers Do You Desire Table.](#)"

Now, think about how many complimentary sessions you would like to do in a given week. To determine this number, consider:

- **What's a realistic number for you?**
- **How long do you want to take to enroll the desired number of clients?**

Great! So now that you have a realistic goal for the number of complimentary sessions you intend to do each week, and you know about how long it will take to get there, you're set up for success!

Once you have met your goal and have the total desired number of clients you would like, then you may decide to dial back the number of complimentary sessions you offer each week. At that point, you might continue ongoing to do 1-4 complimentary sessions per week to account for the natural attrition that happens in any business.

#2 - Create A Comp Session Schedule

Now that you know how many sessions you'll be doing per week until you are at the desired number of clients, block out specific times in your calendar for doing Complimentary Sessions. Forty-five minute sessions are recommended, and block one hour of your time, so you have 15 minutes between sessions. Block Complimentary Sessions the same time each week.

Having a schedule will...

- Increase your focus and intentionality to fill those slots
- Increased professionalism to your audience
- Becomes a habit
- When you do them back to back, they tend to get better – conversion increases
- When you do them back to back, you build confidence

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- When you do them back to back, it takes the pressure off

#3 – Set the Intention to Make Comp Session Invitations

Now you're ready to begin offering complimentary sessions!! You don't have to wait one moment more!

Right away, consider the ways you can make invitations for complimentary sessions. Look at your Marketing Funnel (in your Authentic Marketing Blueprint) and notice the tactic(s) you're using in Step 1, "Shine Your Light."

Now that you know how many complimentary sessions you would like to offer in a given week, ask yourself, ***"Am I generating enough prospects during Step 1 to fill my complimentary session openings?"***

If you are, that's great! Get out there and start inviting people to participate in a complimentary session!

If not, you may want to adjust Step 1 of your marketing funnel to enroll more prospects.

Here are some ways to attract and enroll more people to complimentary sessions:

- Look at what you're already doing this week. Where are you planning to be? Are there courses you plan to attend (in person or over the phone)? Where do you find yourself communicating with others? At the gym? Online? At membership groups or non-profit organizations? Do you belong to a club? Leverage these opportunities to make invitations.
- You could even go to www.vistaprint.com and print up postcards with your elevator pitch printed on them with a prominent invitation for a complimentary session. Hand them out wherever you go.
- Think about who you know that might be interested in a complimentary session and call them up and invite them.
- Do you have a mailing list? If you do, why not send out an invitation to your list. Give them your elevator pitch and a list of 5-10 benefits of doing a complimentary session with you. To create urgency, put a limit on the number of people who will receive a session... "For the first 4 people who respond, I'd like to invite you to a complimentary session with me, where you will...(insert the value they will receive)..."
- Find out about the networking events in your area and plan to go. Set the intention to invite at least 4 people to a complimentary session.
- Make a list of the people you know who serve the same target market as you, but who don't directly compete with you. Approach them and let them know you'd like to offer a special gift to their customers. Give them coupons for a complimentary session with you, and invite them to give to

each of their current customers, along with all future customers. Perhaps they would like to offer some kind of gift to your customers as well.

So right now, decide how you will create an abundance of opportunities to fill your weekly complimentary sessions. When can you do it? When are there opportunities to make these invitations?

Write down what you intend to do.

#4 – Master the Language of Inviting People To a Complimentary Session

Now that you have plenty of opportunities to invite people to complimentary sessions, the question is, how do you actually do it.

The #1 Rule to booking complimentary sessions is to be in listening and helping mode with everyone you meet.

Thus, when you meet someone and start talking to them, make sure you always give them time to tell you about them. This is key, because by listening to someone, you give them the gift of being heard. This helps them start to develop trust in you. It also enables you to learn about what's up for them. It helps you better understand how you can help them.

Sometimes you can help them by offering your skills; other times you can help them by telling them about another resource that could be valuable to them. Either way, once you are known as someone who can help others, you take the first step in developing a lasting relationship with them.

Remember that everyone you meet might not be the perfect client for you. However, it's probably true that **everyone you meet knows at least one person who could be a perfect client for you**. This is important to remember, especially when you're in conversation with someone you feel would never be a good client match with you. Don't give up on the person, as they might be someone who can refer plenty of business to you.

So, now that you're out there and you know you want to be a problem solver, here's a recommended approach on how to invite people to a complimentary session:

First, ask about them. Find out about their life, their work, their interests, their family, etc. Just be in curiosity mode. Let them feel fully heard, understood, appreciated, and honored.

Second, offer support or help. Be helpful in any and every way you know how. Without coming off as a know-it-all, you can suggest introducing them to people that they might want to meet, you can tell them about a book or program that

might solve one of their problems, or you can gently give direct suggestions or advice related to their challenges.

Third, wait for them to ask about you. The conversations will naturally lead to you if you spend enough time listening to them. This is critical, because the person will be asking you to tell about yourself, rather than you voluntarily giving them your pitch. And because they've already felt heard by you, they will be more likely to truly listen to you.

Fourth, give your elevator pitch. Now is when you tell them about what you do. Share with them your elevator pitch letting them know who you help, what you help them do, and what is unique about your services. The pitch should be short – less than 60 seconds – but provocative and informative.

A good elevator pitch will always lead the other person to do one of three things:

- **They will either ask more questions about what you do**, which will give you the opportunity to tell about your Proprietary System. After this, tell them that you offer complimentary sessions to anyone needing this service. *And then ask them if they know anyone who would like to experience a session with you.*
- **They will tell you that they resonate with what you are saying**, and therefore reveal themselves as your target market... someone who NEEDS a complimentary session. Let them know that you offer complimentary sessions to anyone needing this service. *And then ask them if they would like a complimentary session.*
- **They will tell you that they know someone who might need your services**, and therefore reveal someone they know as your target market... someone who NEEDS a complimentary session. Let them know that you offer complimentary sessions to anyone needing this service. *And then ask them if they would be willing to introduce you over email to their friend, so you can invite them to a complimentary session.*

#4 – Start Signing People Up Right Away

Starting this week, make the choice to start inviting people and signing them up.

Once someone says “Yes, I’m interested in a session,” it’s important to book the appointment right way. If someone expresses interest, you want to book a time right then and there.

Thus, anytime you go to a speaking engagement or a networking session, it’s a good idea to bring your schedule, so you know when your complimentary session openings are. If you wait until later to book the appointment, you’ll dramatically decrease the likelihood the session will take place.

Also, you want to schedule the comp session as soon as possible. Many experts suggest within 48-hours, but certainly within the week. People are more likely to keep their commitment with you if you do the session right away, rather than days or weeks later when they've forgotten their excitement of working with you.

#5 – Include Preparatory Homework for the Call

It's highly recommended that you invite prospects to do a bit of preparatory work before the complimentary session.

The main reasons for this include:

- They will identify for themselves the reasons why working with you is a good idea
- They will invest time and energy into the process immediately, so they will be less likely to back out or not make the appointment
- They will begin the process of sharing information with you, which is key to building trust
- You will have more information about them before the session takes place, so you'll be more able to provide deep VALUE to them during the session

In general, the homework you assign to them should help them:

- Identify specifically what they want.
- Identify how they will feel when they get what they want
- Identify the obstacles or struggles that have kept them from having what they want
- Identify what they will feel if they don't get what they want

You can either create a list of 3-7 questions for them to answer, or you can ask them to fill out some kind of an assessment.

Keep in mind, the more you can serve your specific target market, the better. Hence, craft your questions to directly speak to your target market and their needs.

#6 – Immediately Send a Follow Up Email

Now that you've booked the complimentary session, it's important to immediately send out an email confirming the appointment, providing logistical instructions for the call/meeting, and giving them the preparatory homework.

Here is an example:

Dear <firstname>,

It was lovely connecting with you this afternoon. I look forward to our continued conversation on <date> at <time>. Please call me at **XXX-XXX-XXXX**, at that time.

If for any reason you need to change the appointment, please contact me at least 24-hours in advance, by emailing me at your@email.com or calling me at XXX-XXX-XXXX.

Prior to our call, please carve out some quality time to contemplate and write down your answers to the following questions. We'll use them as a basis for our complimentary session. Please email your answers to me at your@email.com before our session.

1. What are your primary objectives for the next 3-6 months in your business? Please list them.
2. Which of these primary objectives is most important to you?
3. Describe how you would feel if this objective were complete. Please describe the specific feelings you would feel.
4. What do you see as the blocks or obstacles that, up to this point, have prevented you from fulfilling this objective?
5. How will you feel if, in a year from now, nothing has changed?
6. Is there any thing else you would like to add before we conduct our session?

One last note: I have a rather full schedule and treat these complimentary sessions very seriously, so please let me know at least 24 hours in advance if you can't make our call.

Thanks so much. I look forward to speaking with you soon!

Warmly,
Your Name

#7 – The Complimentary Session Structure

In brief, here's the basic outline of a complimentary session:

1. Welcome them and Make a Connection (1-3 minutes)
2. Review Call Agenda (1-2 minutes)
3. Brief Personal Introduction And Your Specialty (3-5 minutes)
4. Provide Unforgettable Value! (20-25 minutes)
5. Restate The Value Provided (1 minute)
6. Explain How You Can Help Them (1-3 minutes)
7. Make An Invitation (1 minute)
8. Explain Your Packages and Pricing (3-7 minutes)
9. Sign Them Up / Overcome Objections (5-15 minutes)

1. Welcome them and Make a Connection (1-2 minutes)

The key here is to keep it short! Do a quick hello and welcome. Your energy and enthusiasm will set the tone; you don't need to say much. Resist the desire to be chatty. Move right into the call agenda.

2. Review Call Agenda (1-2 minutes)

Next you want to let the prospect know what's going to happen on the call.

In particular, it is important that you **let them know up front that if you think there is a fit** and that you can help them, **you are going to ask them to be your client**. This is one of the key success factors of the complimentary session.

Here's what to tell them (feel free to modify to fit your language, offering, or personality):

- Let them know that the call will last approximately 45 minutes. Ask them if that's okay?
- First, with your permission I'd like to share a little bit about myself with you and answer any questions you might have.
- Second, we'll spend about 20-25 minutes discussing the questions you answered in preparation for our session. My goal is to provide you with clear value that you can walk away with and use immediately.
- After that, if I think we could work well together, I will invite you to be my customer. How does that sound?

3. Brief Personal Introduction And Your Specialty (3-5 minutes)

Here's where you tell a little bit about yourself. Provide the name of your business, your elevator pitch, and a VERY brief synopsis of your background highlighting some of your successes. You may also want to share a smidge about your personal life: where you live, if you have children, if you're married, and any pets you have.

4. Provide Unforgettable Value! (20-25 minutes)

This is where you provide a sampling of your services. Here are some suggestions on how to conduct this part of the session:

- Simply review their responses to the questions in the preparatory homework and use the information to offer your expertise, whatever it is.
- Perhaps you do some kind of exercise. It could even be that you send them a visual aid or a worksheet to complete as you're doing the exercise with them. Make sure that the exercise somehow addresses the preparatory questions you asked them. The questions set up a need, so make sure the exercise you do with them answers that need in some way.
- In deciding what to do with this time, look at the type of service you provide and see if there is some piece of the puzzle you can tackle with them in 20-30 minutes, so that they walk away with a clear outcome.
- If you decided to do an assessment, rather than a list of preparatory questions, you could use this time to reveal the analysis of the assessment. Make sure the analysis opens up talking points or questions you can ask them to help them further explore their needs and wants.

5. Restate The Value Provided (1 minute)

At the close of this section, it's good to do a brief recap where you state the initial problem or need expressed, and one or more ways discovered from the conversation that they can begin to handle their problem or need.

6. Explain How You Can Help Them (3-5 minutes)

At this point it's time for you to assess whether or not you feel this is a good client for you. Now is the time to get clear with yourself that working with this person is in your best interest and in their best interest.

If you feel clear that you are a good match, then continue on...

Since you did a good job providing deep value (right??), certainly there will be additional questions and needs the person will have as a result.

Think about it: the more you learn about something, the more you realize you don't know.

Thus, now is the time to state the new need they have. It's probably something like this...

- If you need support moving forward on this plan... (note: the new need is structure, experience and accountability.)
- Now that you have a sense for how to "X" you might want to partner with someone who can make sure you have all the tools, resources, and experience...
- Now that you know what needs to happen, you may be wondering exactly how you will do it...

And once you state the need, then you can simply state, "And I'd be delighted to help you with that."

7. Make An Invitation (1 minute)

After you explain how you can help them, immediately make the invitation. Your invitation might sound something like this...

- When would you like to get started?
- How can I support you from here?
- I honestly feel I can support you. Are you ready to get started?

After you ask the question, BE SILENT. Shut your mouth and wait for them to respond. Don't say anything until they say something. Too often a perfectly good invitation crumbles when the inviter crumbles and re-nigs or qualifies the introduction. Just make the introduction and be silent. They will answer you.

They will respond.

They will probably say, "Well tell me more about how you work with people and what your pricing is."

8. Explain Your Packages and Pricing

Now is when you explain how you engage your clients and how much you charge. It's always best to give your clients some options on how they can work with you. Choices work much better than simple yes/no responses.

Hence, before the complimentary session, work out three different packages or three different ways they might be able to work with you.

The options might vary by the number of hours you work with them:

- Package A – four 1-hour sessions per month for \$800 per month
- Package B – three 1-hour sessions per month for \$675 per month
- Package C – two 1-hour sessions per month for \$500 per month

Your options might vary by format. Here's one example:

- Consulting Program – This program is for clients who want the highest level of support. They want me/us to come in and do the work for you. This program starts at \$2500 per month.
- Coaching Program – This is for clients who want the highest level of personal connection, but they want to do the detailed work themselves. This program is \$800 per month and includes three 1-hour executive coaching sessions.
- Group Program – This is for clients who would like to experience the energy and possibility of working in a group with other likeminded people. This program includes two 90-minute group coaching sessions, one 60-minute informational call, and a book of the month. The investment for this program is \$350 per month.

After you share the options, ask the question, “**Which option is best for you?**”

9. Sign Them Up / Overcome Objections (5-15 minutes)

They will either select an option or they will give you an objection.

If they select one of the options...

Thank them and let them know how honored you are to work with them.

Next, let them know what the next steps are. Let them know how to make a payment, what they need to do next, and what you will do next. You want them to leave the call feeling very clear that

- (1) They are now your customer,
- (2) They know how to pay you, and
- (3) They know what the next steps are to working together.

If they offer an objection...

There are seven main objections that people have to buying. Here they are:

- Not ready
 - “I am not ready now, but maybe in a couple of months.”
 - “I have some things to take care of first.”

- “I’m not sure this is the best time for me.”
- No time
 - “My plate is full. I can’t take on anything more at this time.”
 - “I have several other obligations. I’m not sure I can commit right now.”
 - “I’m not sure I have time for this.”
- No money
 - “This isn’t in my budget.”
 - “Wow, that’s a lot of money. I can’t afford that.”
- Unsure of value
 - “I’m not sure this is for me.”
 - “I’m not convinced this will really help me.”
- Check with third party
 - “I have to check with my wife.”
 - “I have to check with my business partner.”
- Think about it
 - “I am not sure right now, I need to think about it.”
 - “I need to sleep on it and evaluate the options.”
- Interview other experts
 - “I am speaking to several other experts. I’ll let you know.”

The first key to responding to these objections is listening to their deeper need.

The second key is to remind them consistently of the need
 (which they stated to you in the prep work as well as on the call)
 and the pain they will feel if nothing changes.

Always follow up every objection with a clarifying question so you can really understand the objection:

- “What exactly do you mean when you say you’re not ready to commit?”
- “Is it that you flat out can’t afford these services, or is it that you don’t see the value?”
- “Let me ask you, how much would you expect to pay for this kind of service?”
- “If money weren’t an issue, would you be ready to get started?”

And once you know the true objection, then move towards reminding them of what they just told you they really want – the value of your services. Keep bringing them back to that place.

Along the way, you may want to find some kind of compromise that works for them – in terms of pricing, format, or otherwise. Only do this if it feels right for you.

Sometimes people really do need a day or two to think about it. Just be sure you set in your calendar to follow up with them again, so the opportunity isn't lost and forgotten.