

# Bluewire 'Virtual' Client Intensive

## Day 1

**March 2020**



## Notes

## The Kick Off

**Past** | What are you most proud of?

**Present** | What are you most confident of?

**Future** | What are you most excited about?

**The next 2 days** | What 5 things do you want from this Intensive?

1

2

3

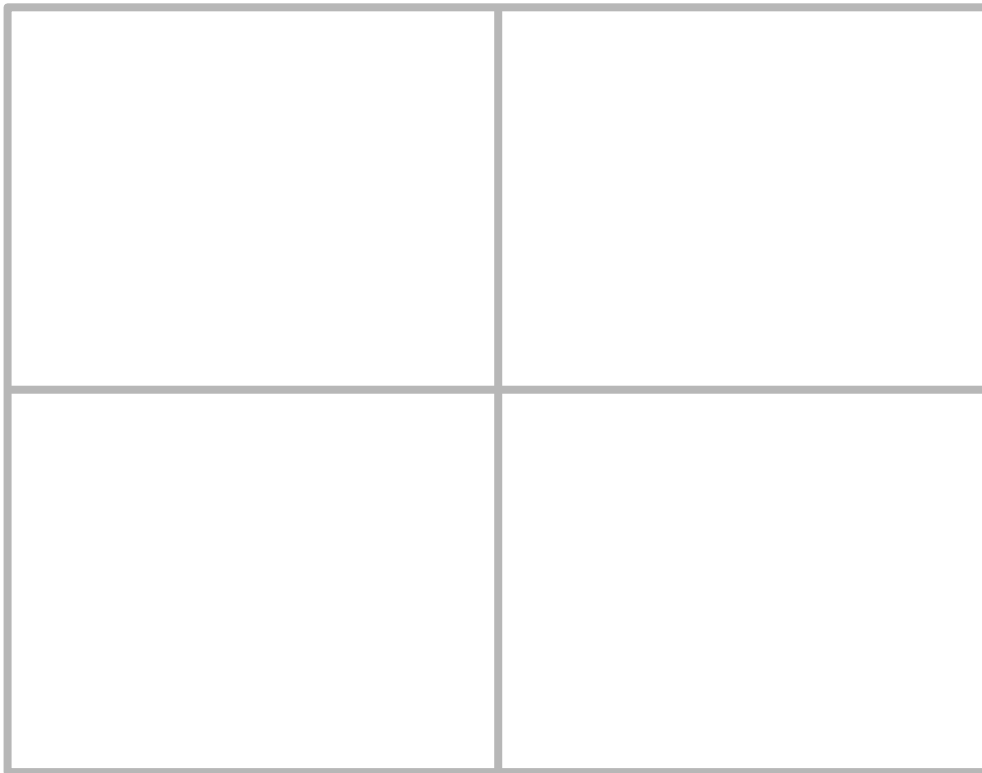
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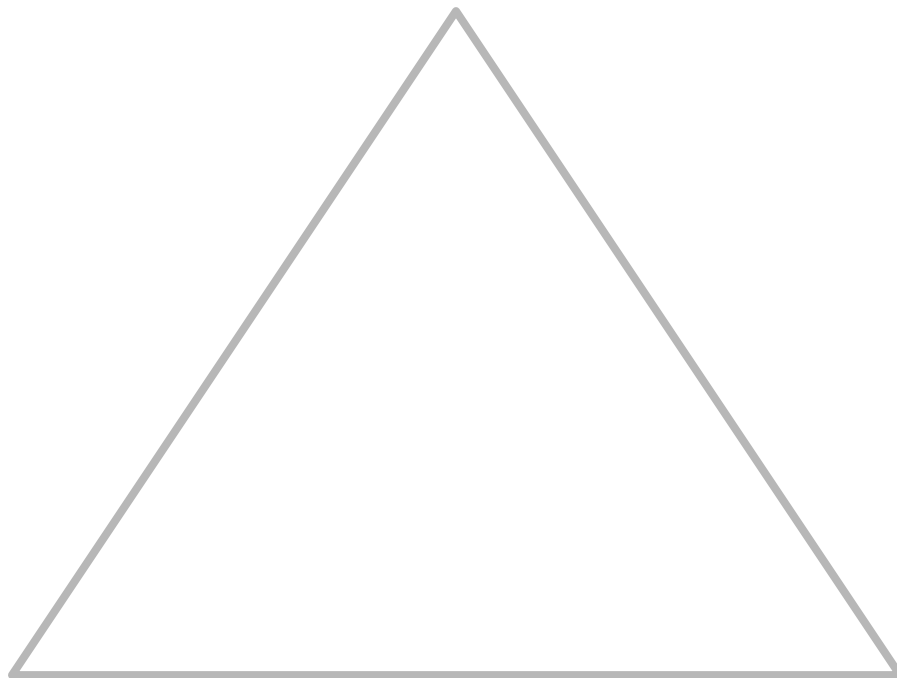
**The Future**



## WFH: The new normal



**Shift to 100% Digital**



## Notes



## Notes

## A 5 Star Prospect

Look for a prospect who	A 5 star prospect...
<ul style="list-style-type: none"><li>● <b>Has all the right ingredients</b></li><li>● <b>Will be successful eventually</b></li><li>● <b>Doesn't <i>need</i> me, but <i>wants me</i> for results quicker."</b></li></ul>	1. <b>Is friendly and coachable</b>
	2. <b>Engages in a dialogue</b>
	3. <b>Knows what they want</b>
	4. <b>Knows when they want it</b>
	5. <b>Wants our help</b>
	6. <b>Has the budget</b>

## Notes

## **SALES: Triage Call Framework (10-15 Mins)**

<b>1</b> <b>Intro + purpose of call</b>	<b>2</b> <b>Why Now? Why Me?</b>	<b>3</b> <b>Tell me about your business</b>
<b>4</b> <b>Widen the Gap</b>  <b>Where are you now?</b>  <b>Where would you like to be?</b>	<b>5</b> <b>What's missing or broken?</b>	<b>6</b> <b>What do you need from me?</b>
<b>7</b> <b>Is this a later thing or sooner things?</b>	<b>8</b> <b>Problem Check-In &amp; Recap</b>	<b>9</b> <b>Budget Discussion</b>  <b>Fit or No Fit</b>

# Triage Script

## 1. Intro + Purpose of call

Hi \_\_\_\_\_, it's Adam from Bluewire here.

I've got a note in my calendar that we have a quick call now...  
is that right?

Great, thanks for joining me. And thanks for filling out the  
short questionnaire beforehand.

We only have 15 minutes now, so we'll need to keep to time  
— is that ok?

My job today is really simple. I'm going to ask you a few  
questions to work out IF or HOW I can help. I'll also tell you  
about my services and the typical investment required.

If I can't help, I'll let you know politely and I'll point you in the  
right direction.

If I feel I can help, we'll book in another time to talk about the  
“HOW”.

Is that ok? OK, great.

## Notes

# Triage Script

## 2. Why Now, Why Me?

Before we get started, why is now an important time to be discussing this?

And why did you decide to speak with me?

Notes

A large rectangular area filled with a grid of small, light-gray squares, intended for handwritten notes. The grid covers the right half of the page, starting below the 'Notes' header and extending to the bottom and right edges.

# Triage Script

## 3. Tell me about your business

So, tell me about your business...

Do you have a business partner?

Who do you help?

What problems do you solve?

And how does it work commercially?

Notes

# Triage Script

## 4. Widen the Gap.

Where are you at right now with \_\_\_\_\_ ?

And where would you like to be in 12 months?

Notes



# Triage Script

## 5. Missing or broken?

If you look at your business right now, is there anything you feel is missing or broken?

Notes

A large grid of small squares, resembling graph paper, intended for taking notes. The grid is composed of many small, light gray squares arranged in a uniform pattern.

# Triage Script

## 6. Need from me?

What do you feel you need most from me right now?

Notes

A large rectangular area filled with a uniform grid of small, light gray dots, intended for handwritten notes.

# Triage Script

## 7. Later or sooner thing?

Is this a later thing or sooner thing?

Notes

A large grid of small squares, resembling graph paper, intended for taking notes. The grid is composed of many small, light-gray squares arranged in a uniform pattern.

# Triage Script

## 8. Problem Check-In

So let me check I've got this right...

From what you've said, it sounds like.....

*(Recap what you've written in your notes)*

Is that a fair recap or is there anything I've missed or perhaps more you'd like to add?

Notes

## Triage Script

### 9. Budget Discussion (optional)

My services/program/product is typically an investment in the range of \$\_\_\_\_\_.

Assuming I was able to show you how exactly how this would work for you, is that that an investment your business is in a position to make to grow?

Notes

# Triage Script

## 9A Is it a Fit? YES.

From you've told me you so far have the all the right ingredients for this to be successful and I'm confident I can help.

The next step here is to book in 'deep-dive' strategy session together, for about 60 mins, to talk about the HOW.

### We'll focus on 3 things:

- #1. The RESULTS you want to achieve... so we're clear on where you want to get to.
- #2. The REALITY now.... so we know what's working, what's not and what we have to work with.
- #3. The ROADBLOCKS... that are holding you back... so we can create a plan to overcome them.

After this session, I'll be certain whether or not I can help, and you will have enough information to decide if it's right for you.

### Does that sound ok?

Cool, I've got a page full of notes here for when we talk next.

**Have you got your calendar open?** When's a good time for you in the next few days? Ok talk to you then.

## Notes

## Triage Script

### 9B. Is it a Fit? NO.

OK, great, I understand.

I said at the start my job today was to ask you a bunch of questions to see IF or HOW we can help.

I promised if I couldn't, I'd let you know politely and try to point you in the right direction.

Now that I know more about your situation and what you need, I don't think my offer is right for you at the moment.

You really want someone who can \_\_\_\_\_ and that's just not us.

For now, what I suggest is \_\_\_\_\_.

Would you like me to send it over to you? Thanks for your time, it's been great getting to know you, and all the best for the future.

### Notes

## Notes



## Notes

## Notes

## Notes

## **SALES: Strategy Session Framework (45-60 Mins)**

<b>1</b> <b>Rapport</b>	<b>2</b> <b>Agenda</b>	<b>3</b> <b>Why is now important?</b>
<b>4</b> <b>Objections</b>	<b>5</b> <b>Results</b>	<b>6</b> <b>Reality</b>
<b>7</b> <b>Roadblocks</b>	<b>8</b> <b>Value Check-In</b>	<b>9</b> <b>Switch Roles. You ask questions.</b>
<b>10</b> <b>Answer the Questions</b>  <b>(+ 3 Question Loop)</b>	<b>11</b> <b>Sign on new client</b> <b>(or book decision call)</b>	<b>12</b> <b>Payment and paperwork</b>

# Strategy Script

## 1. Rapport

Hi \_\_\_\_\_ , it's Adam from Bluewire here.  
How are you?  
How's the weather in...?  
Shall we get started?

## Notes

# Strategy Script

## 2. Agenda

I have a framework to follow today to make sure we cover all the bases so we can put a good plan together for you. Is that ok?

The 3 things I want to discuss:

**The Results you want...** so we're clear exactly where we want to go

**The Reality of where you are now...** so we know what we have to work with

**The Roadblocks holding you back...** so can we can overcome them.

You can take the conversion anywhere you like. Just let me know. Is that OK?

## Notes

# Strategy Script

## 3. Why is now important?

Before we get started...

- Why is this discussion important to you right now?
- On a scale of 1-10, how important is this for you?

Notes

# Strategy Script

## 4. Objections

Before I get into this, you may have some questions in the back of your mind. You're probably thinking something like:

- How long is it going to take?
- Will I get an ROI?
- What if don't have enough budget?
- What if I don't have resources to help implement?
- What if I don't have enough time?
- What if my business is unique?
- I'll need to run it past my partner?
- I'll need some time to think about it?

Do any of these sound familiar? Which of these are on your mind?

Ok great. Now that we've discussed that, let's get into it.

## Notes



# Strategy Script

## 5. RESULTS

Suppose we were having this conversation in **3 months** time and we're looking back over it all...

What would have had to have happened for you to feel really happy with the outcome?

- In terms of what you've produced?
- In terms of monthly revenue?
- In terms of new clients?
- In terms of leads and sales conversations?

Why are these important to you?

(What do the top performers look like?)

Notes

## Strategy Script

### 6. REALITY: So we know what we have to work with

What do you think I need to know about how it is right now?

- What's been working?
- What's not?

What have you tried?

Is there anything you've aspired to try? \*\*What specifically?\*\*

What else would you like to add? Is there anything we've missed?"

Notes

## Strategy Script

### 7. ROADBLOCKS: So we know what we need to overcome

Let's make a list of everything that's:

- getting in your way,
- slowing you down,
- or stopping you from getting what you want.

What can you tell me here?

Notes

## Strategy Script

### 8. CHECK-IN FOR VALUE

Ok, let me make sure I've got this all down right...

A successful outcome for you would look like: \_\_\_\_\_

But right now it looks like this: \_\_\_\_\_

And what's in the way is: \_\_\_\_\_

***(Recap what they've told you from your notes)***

Is that a fair recap so far?

Did I miss anything? Or is more you'd like to add?

From our discussion so far, what's been most valuable to you?

Notes

# Strategy Script

## 9. SWITCH ROLES.

I've been asking the questions and I feel like I've got a good handle on where you are and what you need...

Let's switch roles & you ask the questions.

Where would you like to take the conversation from here?

Notes

# Strategy Script

## 10. ANSWER QUESTIONS

*(Answer all the questions they have)*

### 3 QUESTION LOOP:

- Is this making sense so far?
- Are you 100% comfortable with everything so far?
- Where do you want to take the conversation from here?

Notes

## Strategy Script

### 11. SIGN ON NEW CLIENT (or book decision call)

#### NEW CLIENT

Great. All we need to do to get started is process a credit card? And book in our first session.

Have you got your credit card handy?

Have you got your calendar open in front of you?

Great. When's a good time in your calendar to get started?

#### OR Book a Decision Call.

Of course, I understand. How long do you feel you need to think it over?

When's a good time in your calendar to discuss your decision?

Great. Talk to you then.

#### Notes

# Strategy Script

## 12. PAPER WORK & GET STARTED!

I'll send you over the paperwork now, and I've booked our first session in the calendar.

See you then!

Notes

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## Notes

## Notes

## Notes


# The Mastermind

**Challenge** | My specific challenge is...


**Question** | My specific question is...

**Insights & actions**


# Action Item Capture Card

<b>Strategy</b>	<b>Effort</b> 
<b>Action Items</b>  →  →  →	<b>Potential Money Made (\$)</b>  <b>Potential Money Saved (\$)</b>

# Action Item Capture Card

<b>Strategy</b>	<b>Effort</b> 
<b>Action Items</b>  →  →  →	<b>Potential Money Made (\$)</b>  <b>Potential Money Saved (\$)</b>

# Action Item Capture Card

<b>Strategy</b>	<b>Effort</b> 
<b>Action Items</b>  →  →  →	<b>Potential Money Made (\$)</b>    <b>Potential Money Saved (\$)</b>    