Ethical Scaling

Strategic Review Template

Strategic review

What are the main goals of the Perfect Last Touchpoint:

- Leave your clients wanting more
- Give them a memorable ending
- Cherish the relationship you've built over time

Goals for the call:

a. Celebrate Client Wins so far
b. Understand where the client is based on the goals you defined early in the process
c. Uncover any major obstacles they are not aware of yet (they don't know what they don't know)
d. Discuss the options for next steps and continuation/upgrade

Flow of the Call:

1. <u>Set the Agenda:</u> a. Rapport b. Timeframe c. Go through next steps together	**2. <u>Celebrate Wins & Highlights:</u>** a. What wins have you had and challenges overcame? b. Assess progress towards initial goals
3. <u>Where Next?:</u> a. What would you like to achieve next? i. What's the 'New Goal'? b. Next actions (+ problem education)	**4. <u>Offer & Next Steps:</u>** a. Present the Back-end Offer i. If yes - book kickoff call ii. If no - explain offboarding iii. If 'Need to Think' - get a follow up booked

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1. ***Agenda***
    a. Connect
    b. Greet them and lay out the framework for the call
        i. 1-2mins, but really important!

2. ***Celebrate Wins and Highlights***
    a. Start off by asking the client to share with you some of their biggest wins, highlights, stand out moments from the program!
        i. If the client has achieved their big outcome/success - celebrate!
        ii. If they haven't - no need to panic, let's use this opportunity to reflect, learn and grow.
    b. We also want to assess progress made towards the original goal they had from the beginning - even if they didn't achieve it yet, that's okay. If we've managed expectations properly throughout the journey it's not a surprise, and can be a great learning opportunity for the client!
        i. What did you learn by going through the process?
        ii. How will that serve you now moving forward?
    c. Share what you have seen in the client that you feel needs to be recognised!
        i. Did the client show great resilience to bounce back from challenges? Were they super disciplined with follow through? Did they take ownership if things didn't work?
            1. Use this chance to reward the right behaviors!
    d. Don't 'rush' this process, it shouldn't feel like a 'tick the box' exercise, we really want them to see how far they've come!

3. ***Where Next?***
    a. What are the next goals for the client? I.e. the outcome they want to achieve, that we will help them with during our continued work together
        i. Based on where you are now, what does success look like for you over the next 3/6/12 months?
    b. What challenges do they have now that could stop them reaching it?
        i. Let them share the obstacles they see initially
            1. You can then lay out some of the problems that lay ahead which they cannot see yet (problem education)
        ii. "What got you here won't get you there" →some clients will think

that because they were successful in the front end, they know what it takes to continue benign successful to reach the next level, which often is not true.

c. Given their current status and goals, what are the next actions they must take
    i. You can bring some strength here and let the client know the path forward
    ii. Tell them 'what' to do, without getting too much into 'how to do it'
        1. E.g. you need to grow your topline revenue through increasing acquisition → we don't need to tell them they should run paid facebook ads to a VSL and schedule a call with the closer…
        2. E.g. you need to continue losing weight in a sustainable manner until we hit the target goal, and from there go into a reverse diet to bring calories back to maintenance → we are not telling them 'how' to continue the weight loss or set up a reverse diet, just painting a picture of the next steps

4. ***Offer and Next steps:***
    a. Explaining the flow of the backend program with a timeline
        i. Who is it for
        ii. What does it cover
        iii. What outcomes could they expect
        iv. Timeline and Cost
    b. Ask them where they would like to go from here
        i. If they want to move forward tell them about the investment, secure the ascension, and book an onboarding call for the next program
        ii. If they are not moving forward, explain the offboarding/graduation process
        iii. If the client needs to think about it, book a follow up call for 2-3 days time to get a decision
    c. If they enroll set up a kickoff call for them, and explain the next steps
    d. If they don't enroll let them know the graduation process - when they will be offboarded, what they will keep/lose access too etc.

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Reflections:

- What was **most valuable** for you from this training?
- What is **one thing** you can take and implement right away on your next SR?

Feedback on Previous SR's:

- What has been the feedback you have received so far from your Strategic Reviews?
- What challenges/areas to work do you have when it comes to the SR?
- What do you feel really good about or most comfortable with?