

Phone Calling - Area 2: Pre-Sales - System



Area 2: Pre-Sales www.TheVisionProject.net/VAT_S2A2.htm

Area 3: The Sale www.TheVisionProject.net/VAT_S2A3.htm

IMPORTANT NOTE: In the above link you will see the graphic. **Please “Click On” the box** to drill down so one can learn how to do specific tasks to gain certain skills. Remember that we often are **doing Area 2 and 3 together** so training in both areas is important to our success.

Version 2.01

- [ALL Document](#) -
- [Area 2: Pre-Sales System](#) -
- [Setting Calendar Appointments](#) -
- [Flow Chart / Steps](#) -
- [30 minute Strategy Session Checklist](#) -

Point of Entry

Step 1: Put all information into MCAT. Make the call :)

Step 2: Seek to Ask Level 1 and 2 questions

Step 3: Determine if they are a High Quality Prospect -

Step 4: IF a HIGH quality prospect schedule appt with Mark.

Step 4a: IF a LOWER quality lead work the lead to get them to a higher lead.

Step 4b: Get them involved in Mastermind Partnerships, IP courses, free mastermind calls.

Step 4c - Email confirmation of 30 min strategy appointment

Step 4c - Reminder Email of 30 min strategy appointment

Step 4c - Reminder Email sent out through AppToto

Step 5 - Email From Mark after 30 min strategy appointment

Step 6: Email after 30 minute coaching call

Step 6a: Follow up Email to send after 30 min in AppToto

Step 5b: Email to send for missed appointment

[Making Appointments Stick!TO MAKE AN APT STICK...](#)

[Follow up after 30 Minute Strategy Session](#)

[PROSPECT GROUPS](#)

[Email with testimony for ActionVision Prospects](#)

[Speed coaching invitation example 1](#)

[Speed coaching invitation example 2](#)

[Mark's Thoughts For Emails](#)

[The Anatomy of Story: 22 Steps to Becoming a Master Storyteller](#)

[Area 2 - Weekly Meetings Agenda -- Text Doc for weekly training subjects](#)

Point of Entry Principle . . .

1. As soon as a lead hits, **IMMEDIATELY** we need to have someone determine the level of prospect this is.
2. We need to make sure they get put in a marketing database group so the marketing / Box 5: Strategic Strike will nurture them without any other efforts. Forward on to Lead of Area 2 (currently Angel)
3. If a strong enough prospect then who will call them, what is the goal, the plan to help the individual and to generate dollars?

The faster you or one of your fellow team members respond to someone who acts on something people raise their hands on the better results we'll get.

- Example: Marchel Rogers just registered. I know Marchel is a friend referred by Kevin. I know a lot about him. How do I quickly download that information to the person making the call?

1. Do we assign every prospect to one of the 4 of you making phone calls?
2. Do we create a Prospect Management System for each of you to work and then each of you prioritize the prospects to continue to work those prospects each week? Do we do that in My Buckets in MCAT or on a spreadsheet? My guess is spreadsheet. :-)
3. We all have to learn how to get the best prospects to the top of the list and then what to do with them.

Step 1: Put all information into MCAT. Make the call :)

The goal of every White Paper, Roundtable, Click, Survey . . . is to set a 30 min appointment. If a High quality lead to set with Mark, if a low quality lead to set with an EVA.

Step 2: Seek to Ask Level 1 and 2 questions

Always great to start out with "So. . . what would be your Biggest Challenge" . . . and then, if not already asked, work to ask Level 1 and 2 questions.

> [Biggest Challenge TO Income White Paper](#)

Step 3: Determine if they are a High Quality Prospect -

Key Things To Seek For Best Apt

1. Are they the decision maker?
2. Is their pain / biggest challenge large enough for them to have a high sense of urgency to take action quickly?
3. Do they have enough income or can they access cash / credit to be able to make the required investment?

Step 4: IF a HIGH quality prospect schedule appt with Mark.

[Checklist for how to schedule an appointment](#)

Step 4a: IF a LOWER quality lead work the lead to get them to a higher lead.

To do this, make sure to touch weekly with email. Or call to follow up/check in on how they are doing with their biggest challenge.

Step 4b: Get them involved in Mastermind Partnerships, IP courses, free mastermind calls.

See the SC12 doc [HERE](#): SC12 - Partnerships - Success Circle of 12 - MASTER DASHBOARD

Notes:

1. Did I get all info into MCAT.
2. Do we have a rock solid system in place and did I follow that for those who meet Mark?
 - a. Am I seeking as an E-VA to get Level 1 and 2?
 - b. Do we have a strong email that encourages them and shows them the benefit for filling out the survey if E-VA did not get it?
 - c. Do we believe they are a high quality prospect? (See Below) Remember . . . if an apt. is scheduled and there is no sale that costs Mark and Synergy both time and money. It's not that we need to be fearful of that we just need to make sure that we're rock solid in doing what we know we need to do to insure as solid apt. as possible with Mark.
 - d. If Mark is meeting, do we have a standardized short email that introduces them to Mark and best positions for them to have a very high position of Mark. The higher impression they have, the more likely they will keep the appointment AND they will follow Mark's recommendations.

Step 4c - Email confirmation of 30 min strategy appointment

Subject: <NAME>, Mark looks forward to talking with you!

Body: Hi <NAME>,

Mark Boersma is looking forward to talking with you soon.

Your 30 min Strategy Session is scheduled for _____ at _____.

The most important goal, _____, for that call, would be to assist you in some area of your business / life. Others have said about the 30 minute Strategy Session. . . *"This is the most amazing 30 minutes I've ever invested into anything. It's changed my business and life."*

_____ I don't know if that will be your experience but I'm sure you would enjoy it if it was that good. :-)

If you haven't already, _____, please complete a [short seven minute online series](#) of questions. I believe that you will find the questions interesting and our thoughts to your responses even more interesting. :-) Your responses will help Mark to be most prepared for your conversation with him.

Sincerely,

<NAME>

PS. Some individuals find value in getting to know a little about Mark prior to meeting with him. [- NBC TV Interview -](#) [- Mark Boersma - Mastermind Profile -](#)

***Notes on Step 4c.

Send reminder email DAY before appointment.

Each day look to the next day to see what appointments are scheduled and which ones need to be reminded. Send appropriate emails.

Make sure all info that we currently have is updated in MCAT. (Name, Phone, Email, BC. . .)

Step 4c - Reminder Email of 30 min strategy appointment

Subject: <NAME>, Mark looks forward to talking with you TOMORROW!

Body: Hi <NAME>,

Mark Boersma is looking forward to talking with you TOMORROW!

Your 30 min Strategy Session is scheduled for _____ at _____.

If for some reason you are unable to keep this appointment, please reply to this email and let me know! We can then work to reschedule your 30 Minute Strategy Session!

If you haven't already, _____, please complete a [short seven minute online series](#) of questions. I believe that you will find the questions interesting and our thoughts to your responses even more interesting. :-) Your responses will help Mark to be most prepared for your conversation with him tomorrow.

Sincerely,

<NAME>

PS. Some individuals find value in getting to know a little about Mark prior to meeting with him. [- NBC TV Interview -](#) [- Mark Boersma - Mastermind Profile -](#)

Step 4c - Reminder Email sent out through AppToto

Subject: Reminder: Mark Boersma tomorrow at 3 pm

Body: Hi <NAME>,

Hi,

This is a reminder for your appointment with Mark Boersma on Thursday at 3:00 pm CDT.

Here is a link with more information about your appointment:

<http://www3.apptoto.com/r/preview>

Please take a second and confirm or request to reschedule your appointment by clicking the buttons below!

Confirm

Reschedule

If you haven't already, please complete a [short seven minute online series](#) of questions. I believe that you will find the questions interesting and our thoughts to your responses even more interesting. :-)

Your responses will help us to be most prepared for your conversation tomorrow.

Thanks,

Mark Boersma

PS. Some individuals find value in getting to know a little about Mark prior to meeting with him. - [NBC TV Interview](#) - [Mark Boersma - Mastermind Profile](#) -

Step 5 - Email From Mark after 30 min strategy appointment

Subject:

<Name>, it was a pleasure getting to know you in our Strategy Session today. Thank you for your time.

<NAME>, thank you for the opportunity to get to know you better today. You have an amazing story and some great dreams and goals.

As I mentioned <NAME>, my associate Brianne will get out to you a survey where you can share your thoughts.

Teresa, <NAME> expressed some interest in more information on the following. If you could follow up with her in a couple of days to see if she has any questions on the Strategy Session and the Business X-Ray that would be great.

Step 1: Deep Examination - Business X-Ray

-<http://dnaforsuccess.com/examination/business-x-ray/>

Step 2: Possible Solutions -<http://dnaforsuccess.com/solutions/>

Step 3: Implementation -<http://dnaforsuccess.com/implementation/>

<NAME>, you are in great hands with Teresa. She will be able to answer any questions you might have and she could schedule and do the Business X-Ray if that is something you are interested in. I have so many ideas for you that I would personally like to do the review session of the Business X-Ray if that is something that you would like to take advantage of.

<NAME>, one other quick favor. If you found the Strategy Session helpful we would like to offer this to three other people you may know. We have found that successful individuals, like yourself, tend to know between three and nine other very successful people who are also looking for solutions which will help them see greater success in every area of one's life. We love to help people!

Teresa will follow up to see what three people you know who might benefit from a complimentary 30 minute Strategy Session.

Let me know if you have any questions and/or if there is anything else I can be of assistance to you.

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Sincerely,

****NOTES on Step 5 -**

At the end of every day check the calendar to see what 30 Min appointments were made. IF you do not see email from Mark concerning that 30 min, email Mark to find out who showed up and who didn't and what the next steps are if any for those that did show up.

Step 6: Email after 30 minute coaching call

Subject: So . . . how did your 30 minute Strategy Session go?

Body:

Hi <NAME>,

My name is <EVA NAME>. Mark asked me to follow up with you on your 30 minute Strategy Session.

So . . . how did it go? :-) Please fill out this [short survey](#)! We value your feedback. This will assist us to continue to improve the 30 minute Strategy Session to others in the future.

Mark really enjoyed the time together and could quickly see how much potential you really have with just a few minor tweaks to your business systems. He asked me to follow up with you and assist you in making sure that you understood your next steps AND had everything you needed to take those steps.

Mark's Recommended Action To Achieve Your Goals

Step 1: Deep Examination - Business X-Ray

-<http://dnaforsuccess.com/examination/business-x-ray/>

Step 2: Possible Solutions -<http://dnaforsuccess.com/solutions/>

Step 3: Implementation -<http://dnaforsuccess.com/implementation/>

Do you know 3 other people that you think would benefit from a 30 minute Strategy Session? Our goal is to impact people's lives. If you could share the name, phone, and email of just three other professionals who might benefit from the same kind of help Mark gave you, we would really appreciate that. I will send them a simple introduction email, a link to a free white paper, and also an offer to do a complimentary 30 minute Strategy Session. This is all very low key and everyone enjoys learning a little something about their own personality. :-)

I look forward to assist you, in taking action to "Reach beyond your dreams and goals in every area of your life."

Sincerely,

EVA Signature

****Notes on Step 6 -**

Make sure you send follow up email within 24 hours of appointment if able, to get them to fill out the survey.

Make sure that you assign them to someone (or yourself) to follow up until the next steps have been committed to.

Step 6a: Follow up Email to send after 30 min in AppToto

To generate this email to send, immediately after your appointment go into the calendar appointment and type in [FOLLOWUP30] . And the email below will be sent out to the participant.

Subject: So. . . how did your 30 minute Strategy Session go?

Body:

Hi {{ participant.first_name }},

Thank you for the opportunity to serve you in doing the 30 minute Strategy Session.

So. . . how did your 30 Minute Strategy Session go?

Please let us know, by filling out this [short survey](#)!

We loved getting to know you better! We look forward to further assisting you any way we can. If you have any questions please feel free to give us a call anytime.

Sincerely,

Legacy Partners Team

630-393-9909

PS. A number of our clients have really benefited from the [white paper The Secret About Time](#).

You may find it helpful as well.

Step 5b: Email to send for missed appointment

Subject Line

_____, sorry you were not able to attend the scheduled appointment with Mark Boersma.

Body:

Did something else come up?

Mark asked me to email you his disappointment in not meeting with you. Mark shared that he had some specific ideas to assist you with your biggest challenge of _____.

_____, I don't know if you have gotten a chance to review over [Mark's mastermind personal profile](#) or not? Others have found it to be most helpful and interesting.

- [What Others Think Of Mark](#) -
- [What Mark Looks For In Profitable Partnerships](#) -
- [Mark's Unique Process](#) -
- [Mastermind Groups](#) -

As you'll see, if you take a few minutes to review over Mark's mastermind personal profile you'll see that he has a lot going. Mark's very unusual in that he has over 20 extra hours of free time every week. People often wonder how he gets so much done and still has 20 extra hours of free time.

Five years ago, Mark discovered [The Secret About Time](#) which, if you're looking for more time Mark would be the perfect person to talk with.

Mark would love to meet with you at some point in the future. He has asked me to personally connect with you talk to specifically about achieving your goals and overcoming your biggest challenge.

If, after I meet with you, Mark is the best person to schedule time with, I will do that. If someone else on the team or in the network can better assist you, I'll do that for you as well.

Sincerely,

****Notes on 5c - Make sure you continue to follow up with them and work to schedule another appointment with them. If they miss one with Mark, it is best to schedule for someone else on the team (if available).**

Making Appointments Stick! TO MAKE AN APT STICK . . .

1. The person setting the apt. must really sell the person who is doing the appointment.

Example: "You'll be meeting with Mark Boersma, he is an international speaker and author the founder of Synergy Solutions, Inc. and one of the most amazing people you'll ever meet. He will have so much insight into __repeat their biggest challenge__ and __what they would love help on__.

One quick tip to get the most from the meeting with Mark which many have said changed their lives forever, is to maybe take just a few minutes to read his bio and maybe watch when he was interviewed on NBC TV.

He will be right on time and will dig into helping you immediately. Please work hard to insure that you are on time and it's a top priority. It is getting harder and harder to get an appointment with Mark and if this one is missed someone else may need to take it.

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2. We need to send a very powerful (short / tight as possible) email the kind of says the same thing as above w/ links to, maybe Mark's Mastermind Personal Profile, maybe attach PDF of bio and for sure the link to the YouTube for the NBC TV interview.

> > > We need to watch %'s for sets and kept with Mark and really everyone and continue to tweak the process until we get it to the best it can be, as close to a 100% stick as possible. < < <

a. Google Calendar - It would probably help a great deal to put their BC / LH and some copy in the calendar apt as well as that helps to sell the person on showing up.

b. Brianne is working on an automated system for email, text and phone call to provide a reminder so that process will need to be considered.

NOTE: We need to make sure we're careful with the above to not to overwhelm them with too much. :-)

=====

3. After the apt we need to then do a survey on the 30 minute with the person and get that into a system.

a. We need to thank them and ask key questions. I think there is a survey out there already for this.

b. We want to give them a gift of a white paper, ideally one that will them solve their biggest challenge and help them to move closer to a closes sale.

c. We need to make sure that we are asking for referrals and getting them. For every 30 minute we do, we should be able to get 3 more from them. :-)

MOST IMPORTANT . . . We need to make sure with 100% of those we've done that we:

A. Make sure we have someone ASSIGNED TO THEM who will help them to move to the NEXT STEP.

B. Need to put them in groups:

1. Put them in a group of people who have completed the 30 minutes.

2. Take them out of the STEP group they were in and move them to the proper STEP group they should be in.

C. We are touching that group to help them succeed in life AND helping them to refer additional people to us AND helping them to understand the value of maybe even them learning to do the 30 minute themselves.

Follow up after 30 Minute Strategy Session

Listen to this recording to see how to sell during the 30 min Follow up!

http://www.synergytools.net/includes/mtr/training/flash.asp?filename=160518_Wed_14_30_LP_Emily.swf

PROSPECT GROUPS

Email with testimony for ActionVision Prospects

(FNAME),

While you are reviewing the information about ActionVision and as we await our next conversation, here are some great insights from a client who has experienced the program, it's resources, and interaction.

This program can be something different than any other and we wanted to share this with you!

*"For a long time, I "saw" or thought I saw Mark as a business owner trying to make a living for his family, just like all the rest of us are. I thought his primary goal was the same as most people in the world- to make money so he could support himself and retire at some point to enjoy the fruits of his labor. **Then I started to "see" that this was just a reflection of where I MYSELF WAS AT.***

*I started to SEE that as being only on the superficial exterior. The DEEPER REALITY was and is something that I am completely unfamiliar with and still struggle sometimes to accept- that Mark is **coming from a much a different place- a place that is very different than the rest of us.** I do not have much access to this place. It is a place with a different conception of SELF. Where real service to mankind is the driving force, not concerns with my own life issues. **Hard to even imagine what this would mean to me if I were to attempt to live so differently.***

*Much has to be done first though before I could even reach the dimension where **this could be a reality not just imagination.** See, it is not really about making more money, doubling your income or being more successful. I started to catch glimpses of something much, much deeper. Like peering into another dimension for moments. This is what we are really being led to."*

- Alan Stein, President of [Tanglewood Conservatories](#)

We look forward to talking soon and let us know if we can answer any questions!

(our signature)

Speed coaching invitation example 1

suggestion: add the link to the 30 min strategy survey to this copy

Hi (fname),

I know you were not able to attend the Mastermind Seminar last Thursday, and have not moved forward with the business xray, but have something exciting for you.

Next Tuesday (6/2) at 10:30am for 30 minutes, I have the ability to invite some guests to join in a speed coaching call.

I thought of you and hope you will accept. We would love to help coach you very specifically and add tremendous value to you and your business on your biggest challenge, **time management**.

Of course, there is no obligation, but simply another opportunity to find out how we can help business owners be successful and profitable by creating less stress and more balance in their lives.

Let me know today as I only have a few invitations to extend.

(signature)

Speed coaching invitation example 2

Hi Brenda,

I know you have been to the Mastermind Seminar a couple times. Next Tuesday (6/2) at 10:30am for 30 minutes, I have the ability to invite some guests to join in a speed coaching call.

I know from our conversation that you realize the importance and value of coaching and think this is a perfect opportunity to receive benefit on a call.

I thought of you and hope you will accept. If you can answer a few online question in this questionnaire, that would help coach you very specifically and add tremendous value to you and your business on your biggest challenge, **attracting enough clients**.

Let me know today as I only have a few invitations to extend.

(signature)

Hi Dan

Sometimes Things Are Tough / Hard To Learn

The following recording is a very tough but so important lesson to learn in Area 2: Pre-Sales and Area 3: The Sale. Don't let the intensity of the conversation / mentoring, tough coaching to get in the way of the lesson.

DO pay attention, as you don't want to have someone to have a conversation with you like this. Be a great student and learn quickly and deeply.

http://www.synergytools.net/includes/mtr/training/flash.asp?filename=170123_Wed_7_30_Printers.swf

Mark's Thoughts For Emails

Could you help me? - Tell me your story . . .

Subject Line

Could you help me?

Body

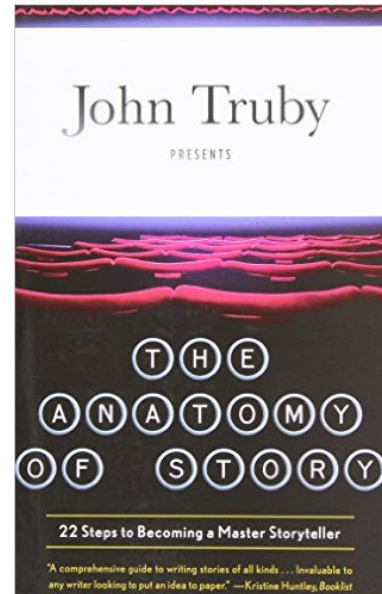
Could you help me?

Actually . . . I was thinking about you and I thought we may be able to help one another. :-)

See . . . I'm reading . . .

The Anatomy of Story: 22 Steps to Becoming a Master Storyteller

. . . and I thought of you. :-) What's your story?



What I mean by that is . . . "If you were to obtain coaching / have help in developing A BOS - Business Operating System, an engine which would run your business to create the lifestyle you desire, what would be your story after twelve months?"

I'm serious! :-)

Please email me . . . twelve months into the future what are you thinking, seeing, hearing and experiencing what you would feel? How has your life been affected? Be detailed! Help me to see, feel, hear what you will be experiencing 12 months from now.

I would love to see - hear - experience your story. The exercise alone I believe will be most powerful for you.

Hope you enjoy the following. :-)

Sincerely,

PS. If you have ever wondered if writing a book would help you grow your business, let me know and I can give you some insight into this as well.

