PHONE FUNNEL: What to Prepare!

Before you can launch your MVC and start enrolling your students, here's WHAT TO PREPARE:

STEP 1: Set up your APPOINTMENT SCHEDULER

When your prospects want to book a call with you to see if they're a good match for your program, I recommend having a SCHEDULER set up so they can book a time. That way, you don't have to go back and forth over email to find a common time to chat.

1. **Set up your APPOINTMENT SCHEDULER.** Go to Calend.ly. It's the appointment scheduler I use because it's beautiful, easy, and they have a free version. Another tool you can check out is Acuity Scheduling.
2. **Sync it with your calendar, and input your preferred availability.**
3. **Copy the URL for your APPOINTMENT PAGE** so you can share with prospects.

STEP 2: Set up your QUESTIONNAIRE

Before you get on the phone with prospects, it's great to ask them a few questions to make sure: 1) They know it's a paid program, 2) They respect you as a subject matter expert, 3) They look forward to speaking with you and feel urgency to enroll in your MVC.

This questionnaire will help PRE-QUALIFY prospects to make sure they're a good match for your program and won't waste your time on the phone call. :)

1. **Check out my sample QUESTIONNAIRE here:** https://coursecreation.typeform.com/to/BVCHEF.
2. **Create your own!** I recommend Typeform as your questionnaire tool because it's beautiful, easy, and free. Use my sample questionnaire as your guide when selecting the type of questions to include. Keep in mind what information will help you prime them to enroll in your program and screen them to make sure they're a good match for you.
3. **Copy the URL for your QUESTIONNAIRE** so you can share with prospects.

STEP 3: Draft your "Please read before our call" email

When someone schedules a call to work with me, I send them a "Please read before our call" email so they know what to expect and so they take it seriously.

This email will help ensure they're ready to give you a decisive "Yes" or "No" during the phone call. (Btw: Even if you don't have an assistant, you can still send this email to prospects in your pretend assistant's name. :))

Here's the email:

Subject: Please read before your call w/ Danielle Leslie

Hi [FirstName],

This is Cynthia from the Danielle Leslie team. Please read the following prior to your call with her.

Danielle is looking forward to speaking with you! Thanks for completing the questionnaire; she'll review it prior to your call.

A few important things to be aware of:

1. **You have exactly 20 minutes for your call.** Please be ready to hear from Danielle at your scheduled time. She'll call you promptly. The focus of the call is to determine whether your stage in your brand & business is a good match for Danielle's 1:1 Coaching. This is **not** a coaching call. :) The goal is to gather enough information to make an informed decision about whether the 1:1 coaching is a good match for your goals.
2. **Please be all ears and distraction-free.** Your time is valuable, and it's important to us that you get the most out of your call. If you can be somewhere quiet and in front of a computer so you can take any notes, that's recommended.
3. **Be ready to reserve your spot.** Danielle has 2 remaining spots for coaching in November. If you're a good match for coaching, she'll invite you to put down your 1st payment during your call. If you miss that opportunity, then you may miss out on working with her.

Please reply to let me know you received this email. Don't hesitate to reach out with any questions prior to the call!

Warm regards,

Cynthia

STEP 4: Set up your PAYMENT SYSTEM

On your PHONE CALLS, you'll invite prospects to join your program. You'll ask them to submit their **payment** or **deposit**. How do you plan to accept payment?

Here are a few payment processing options:

1. You can set up a PayPal account and send them your PayPal link
2. You can set up a Freshbooks account and invoice them
3. Use whatever money transfer or payment system you already use. The key is to KEEP IT SIMPLE for you and them!
4. You DON'T need a fancy sales page or order form for your MVC! Remember: LOW or NO TECH. :) You just need a place where they can enter their credit/debit card info.

NICE JOB!

#RECEIPTS:

1. **In our Facebook group: Post a screenshot of your #Scheduler and #Questionnaire, and tell us how you'll be accepting #Payment for your MVC (e.g. PayPal, Freshbooks, etc.).**
2. Watch the next lesson to dive into putting your PHONE FUNNEL in action.

Quiz

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Did you set up your APPOINTMENT SCHEDULER?

Yes!

No. (If not, go back and do it.)

Check