Bonus!

The Coach School

Bonus:

How to Pre-Qualify Clients

ALLI WORTHINGTON

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How to Pre-Qualify Clients

The best way to pre-qualify clients – before you ever get on a discovery call with them – is to have an application form on your website.

You can see my coaching application on my website here. I'm going to take you through the questions on my application to show you how each works to help pre-qualify potential clients.

Note: Not all of these questions will be relevant to your coaching practice. Do remove some questions for your niche, and edit others!

SAMPLE APPLICATION QUESTIONS FROM ALLI

1) "How do you currently make your main income?"
This question helps me (as a business coach) get an immediate pulse on whether or not the business is going well or if they haven't started yet. If you're not a business coach, you can skip this one.

2) "What's your current monthly net revenue?"
This question helps me as (a business coach) find out what level of business they are at. Again, if you're not a business coach, this one doesn't apply.

3) "What's the one area you would most like to improve on?"
This is a great question for every kind of coach. It helps you figure out the goals of a prospective client. If you ask, "What are your goals?", people will give a lot of random answers, but if you focus it down to one area, people can normally zero in on that.

4) "What has worked best for you to get results over the last six months?"
This helps me see what they've done, what headspace they're in, and if they're an "action-taker" or not. If someone says, "I haven't taken any action" or "I'm not getting any results" you'll know they may be a tougher person to coach than someone who is already trying things and seeing some results.

5) “What’s your biggest struggle right now?”
This helps me see the problems they are dealing with.

6) “What would be a great outcome if we were to work together?”
Give specific examples here of the problems you solve and outcomes you envision for your clients. Customize them for whatever area of coaching you’re in.

7) “If you were confident we could get you these results, what budget could you allocate per month for the next 3-6 months?”
Do this according to what your prices are: \$100/month, \$250/month, etc. Again, this helps you see what their expectations are and whether or not they can afford your services.

8) “Why would you be a candidate for high-level personalized coaching?”
This helps me get to know the person answering: are they an "action-taker," how do they feel about the world, how do they see themselves, etc. (Some people may have problems in different areas than you work with, or have a victim mentality, or need more help than you can give. You want to know that up-front, so you can determine if they will be a good fit for you or if you want to recommend they go a different coach for help.)

9) “How did you discover the opportunity for coaching with me?”
This allows me to track where my coaching leads come from. I have a spreadsheet with the name of every client I’ve ever worked with and where they came from, so I can track what’s working and not working. (You'll have this spreadsheet now, too. You'll find it in future modules!) What tracking my leads taught me was that there’s not just one, two, or even three ways I get my clients. It will be that way for you, too. You need a variety of ways to attract those you’ll work with. We’ll teach more about this in the marketing and funnels modules.

10) "Can you share your website and social media handles?"
This allows me to do research on them to learn more about their personality. (All things that will help you see if you are the right coach for them!)

Depending on your niche, you want to customize questions to help you know what people’s goals are, what they want to fix, what their personality is like, etc.

The form will help you know quickly that the person is perfect for you OR that their problem isn't in your area of expertise. If that's the case, you can refer them out to people who can really help them solve their problems.

It is surprisingly simple, right? The bottom line: you want to know a lot about the people who book a discovery call with you – before you ever get on the call. These questions will allow you to do just that.

An important tip for your application:

If you use Google Forms for a coaching application, be sure to adjust the notification settings so that you can get an email alert when people apply.

You can also use a built-in form that will email you (if your website has one), or use a form software that will email you as soon as your form is filled in. (I use Wufoo for my forms.)

You should reply to people who apply for coaching within 24 hours, but only during normal business hours. Don't reply at 9pm or 3am. You're a professional after all!

When an application arrives at 9pm, program your email to them to schedule a call using Gmail's Schedule Send option and program it to go out at 8:00am the next morning.

If you receive an application on a weekend, don't wait until Monday. Email back between normal daytime hours.

Notes: