



Profit from
FREE
Discovery Sessions

C H E C K L I S T

Presented by
[MyNAMS Insiders Club](#)



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PROFIT FROM FREE DISCOVERY SESSIONS

YOUR CHECKLIST

I have recognized that I need to focus and target free sessions in order to bring my ideal prospective client—not people who will waste my time and theirs

- I am committed to set up my free coaching sessions so that they:
 - Weed out those who cannot afford me before they sign up
 - Attract those who are eager to take action and will happily pay, when I present my offer at the end of my free coaching session
- I have ensured that I approach my free coaching sessions using:
 - A specific goal for my free coaching session to achieve
 - A plan to focus in on that specific goal
 - A system I can apply every time I create free coaching sessions
- I have ascertained specifically whether or not my ideal client's most urgent pain point is a:
 - Problem
 - Fear
 - Worry
 - Frustration
 - Block
 - Other_____
- I have brainstormed specific "Big Questions" that directly tap into this pain point

PROFIT FROM FREE DISCOVERY SESSIONS: CHECKLIST

Research and narrow my list of “Big Question” choices down to the one that seems to occupy my ideal client’s mind the most

- Identify the best and most simple, complete solution to this “Big Question” problem—one that I plan to teach or share within my free session
- Determine what specific action I want my free session recipient to take once they receive what I promised within the session (i.e. my closing offer/upsell)
- Identify the pain point/ “Big Question”, I have also determined that solving it will:
 - Show my recipient the value of my closing offer
 - Leave her excited and eager to take the next step
 - Convince her that I have what she needs, when it comes to coaching her towards her goal
- I am basing my “Big Question” on one of these proven basic questions:
 - “What one thing is holding you back?”
 - “What do you need to change right now, in order to move forward?”
 - “Why can’t you create the new habit you know you need to create?”
 - “What is the most important action you need to take right now?”
 - “What one action, tool or skill would move you forward right now?”
 - “Are you stuck/ held back by...?”
 - “How would your life change/be different a year from now if...?”
- I have narrowed down my ideal client’s specific problem or desire—and what is stopping her from attaining it right now

PROFIT FROM FREE DISCOVERY SESSIONS: CHECKLIST

"Do you want to _____ but
don't/can't _____?"

- I have personalized my expression of her problem by being specific, so that it resonates emotionally and strongly with my ideal client

Identify/Create my "Big Question" ...

- Qualifier _____
- Problem _____
- Solution _____
- Promised result _____
- My Solution is a clear call to action that will result in my ideal client signing up for that free session
- Determine that any photograph or graphic accompanying my "Big Question" web form strongly reinforces my message and promise
- Determined what designation will best resonate with my ideal client:
 - Strategy session
 - Success session
 - Discovery Session
 - Free class
 - Free lesson
 - Other _____
- Identify my ideal client and the specific segment she belongs to, and I am focusing only on that type of client while putting together my free offer
- Research to test my "Big Question" idea

I have found potential recipients for my free coaching sessions within:

- ☐ Current clients
 - ☐ Past clients
 - ☐ Networking contacts
 - ☐ Forums
 - ☐ Groups
 - ☐ Membership sites
 - ☐ Local events or meetings
 - ☐ Other _____
- ☐ My research survey taps into the one specific question that I suspect is consuming my ideal audience
 - ☐ I have kept my research poll, question or survey short and specific
 - ☐ I have guided my poll, question or survey respondents into up to three specific choices of answer
 - ☐ Include Text Field in my poll or survey so that respondents can put forth their own answers without having to use a radio button
 - ☐ I have decided not to use a Text Field in my poll or survey. I want to focus only on one of the answer options I have provided.

Sending emails with my research question

- ☐ I am committed to creating a strong, multi-layered email campaign to help support and promote my free sessions and the offer they lead to
- ☐ My email requesting help (i.e. the answer(s) to my research question) has a strong subject line that:
 - ☐ Focus on my client's needs with a "you" message, rather than an "I need" message

PROFIT FROM FREE DISCOVERY SESSIONS: CHECKLIST

- ☐ Includes a specific keyword to personalize my subject line, catch her attention and make it resonate with my ideal client emotionally
- ☐ I will use email when possible in my free coaching session campaign to:
 - ☐ Put out feelers and conduct research
 - ☐ Create interest—and get a buzz going
 - ☐ Promote my free coaching sessions pre-launch
 - ☐ Follow up with people who didn't sign up on my closing high-end offer
 - ☐ Follow up with those who did become clients
 - ☐ Stay in touch with my subscribers
 - ☐ Ask and receive valuable feedback—and ideas for further high-end offers
 - ☐ Other _____
- ☐ I am coordinating and planning my email campaigns
- ☐ I...
 - ☐ Have delegated or assigned my email campaign to someone who is competent and skilled in putting such campaigns together
 - ☐ Am running the email campaigns myself

I have created a launch calendar for both my free coaching sessions and my high-end paid offer the free sessions are promoting

- ☐ I have completed all stages of planning and inception for my free coaching sessions campaign:
 - ☐ Landing page set-up
 - ☐ Web form created
 - ☐ Promotion plan created and initiated

PROFIT FROM FREE DISCOVERY SESSIONS: CHECKLIST

- ☐ Decision made on advertising/no advertising
- ☐ Email campaign created
- ☐ Launch calendar created
- ☐ System finalized and saved for future use
- ☐ Follow up plan/campaign/emails created

I have decided what type of high-end paid offer will work best for my free coaching sessions/ideal clients:

- ☐ V.I.P. Day
- ☐ Coaching Package
- ☐ Mastermind Retreat
- ☐ Élite coaching group, membership site or club

☐ Other _____

☐ I have decided on the best delivery approach for my free coaching sessions:

- ☐ Live sessions
- ☐ Pre-recorded sessions

☐ I have decided on the best free coaching method:

- ☐ Telephone session
- ☐ Skype session
- ☐ Google Hangout
- ☐ Video
- ☐ Webinar

PROFIT FROM FREE DISCOVERY SESSIONS: CHECKLIST

☐ Teleseminar

☐ Other _____

- ☐ I have decided whether or not to add a product line as part of my follow up

I have evaluated my time and decided what I need to charge for my products and high-end offers

- ☐ I have researched what the market will bear in coaching charges for my particular area of expertise—and what my ideal client is happy to pay
- ☐ I have done everything I can to focus my free coaching session promotion on the type of client I want to attract—and to discourage “freebie seekers” with no real intention of taking action
- ☐ I have created a structured outline for my free session, so I get the timing right, include what I need to include and don’t make mistakes
- ☐ My free coaching session is not focusing on impromptu topics; it is a step-by-step guidance towards a measurable achievement by the end of the session
- ☐ I understand that allowing myself to go into “coaching mode” and dealing with areas other than those leading towards the skill or trick I am teaching will leave my recipient feeling the session was “unfinished”, leading to disappointment or frustration
- ☐ I have brainstormed, researched or realized all the objections my recipient might think up and I am preparing for the most important 1-3 objections by heading them off at the pass and acknowledging/overcoming them in my session
- ☐ The measurable result they obtain in this session gives breathtaking value
- ☐ My free coaching session includes a bonus or handout—a digital takeaway
- ☐ My bonus or handout:
 - ☐ Is something they will use regularly

PROFIT FROM FREE DISCOVERY SESSIONS: CHECKLIST

- Directs them also to my blog, where they can help themselves to more resources
- Points them towards a specific offer
- I have prepared an email or form containing a short list of qualifying questions my recipient must answer, before arriving at my coaching session

This list/the answers will help:

- Me—by giving me valuable research data about things like their biggest concerns, knowledge they don't have I was assuming they had, et cetera
- Them—by making sure I am ready for them and tuned in perfectly to their “head space” and concerns

I have given them exactly what I promised

—and over-delivered on value!

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