

NATHALIE GARSON

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Procedure Name: Breakthrough Calls

Purpose:

- (i) The goal is to provide smooth access to NG for leads.
- (ii) Give the lead a good first impression of the company.
- (iii) Client retainment process

Role(s):

- Nathalie Garson – hold session & offer proposal
- VA – Lead relations - pre and post BT Call process

The Process:

1. Lead signs up for BT call by clicking CTA [link](#) & receives automatic email
 - 1a. Check that all BT necessary fields are filled by lead – If complete, move to step #2. If incomplete, send email #6,7
 - 1b. Contacts@ng email receives 2 emails
 - i) ‘Congratulations on setting up your BT call’ email
 - ii) Calendly email with answers to questions

*LTC sheet auto-populates BTC questions from Calendly

2. VA should:

- i. Create BT Doc for an individual lead – Make a copy – name it – fill it using LTC or Calendly email.
- ii. Create a duplicate event of call (NG calendar) and post BT doc in the comments for Nathalie.
- iii. Upload BT doc to Zoho manually in ‘Follow up lead’ field
- iv. Nathalie will send out follow up email after the call with a proposal

3. After the call:

- v. Nathalie will send VA a follow-up email with call details and proposal. agreements discussed with lead
- vi. Save proposal in leads name and upload proposal in Zoho comments for BT

Access Links:

Links	Description
BT Doc template	https://docs.google.com/document/d/1lmd-Z7x0tKXDiLUx5ziPf3oNRhHz0Oaty0B4vVukJUo/edit#heading=h.3j0sgewi0301

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BT Call webpage	https://nathaliegarrison.com/calendar
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Emails

Email Description	Email Content
Email sent to leads who do not fill BT call template completely	<p>Hello Irit,</p> <p>I am happy to confirm your Breakthrough call on xxx, November xxx at xx:xx with Natalie.</p> <p>In order for this call to be as efficient and useful to you as possible, we would like to receive your answers to the following questions before your call:</p> <ol style="list-style-type: none">1. What is your professional activity today?2. Can you please describe briefly what you do today?3. Tell us where are you stuck today?4. What results would you like to achieve?5. What kind of help do you think you need to achieve those results?6. What are you expecting from this call? <p>In order to get more background information on Nathalie before the call, and to make sure that the conversation will be focussed on you, please make sure that you also:</p> <ol style="list-style-type: none">1. Listen to Nathalie's Interview by clicking here.2. Watch the testimonials of clients that worked with Nathalie by clicking here. <p>We are looking forward to receiving your answers before your Breakthrough Call with Nathalie!</p> <p>Best,</p>
Response email to leads who completed BT call template	<p>Hello xxx,</p> <p>I hope you're having a pleasant weekend.</p> <p>Thank you for your prompt response and for the replies that you provided.</p> <p>Nathalie is looking forward to your Breakthrough Call with her for tomorrow Monday, October 22nd at 5:30PM GMT+3.</p> <p>Please make sure to be in front of your computer for the call, and click here to join the Zoom room at the scheduled time.</p> <p>Wishing you a great call with Nathalie!</p> <p>Warm Regards,</p>
Final follow-up email for leads who have not responded to manual questions sent in email	<p>Hello xxx,</p> <p>I hope you're having a pleasant weekend :)</p> <p>Just following up on the questions that I sent to you on Friday. We haven't received your answers yet and we would really like to receive them before your Breakthrough Call with Nathalie tomorrow, Monday 22.10 at 4PM GMT+3.</p> <p>We are looking forward to receiving them asap.</p> <p>Kind Regards,</p>

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Template of email NG
sends to lead after the
call

Hi NAME,

It was a pleasure to talk to you today in our Breakthrough Call and to get to know you better :
)

It's very clear to me that you are an advancing entrepreneur and that you have everything it takes to make your professional goals happen. It's really great to see that...

From our conversation, I understand that you would like to reach the following goals in your business

- Take your practice "full time" by doubling your client base from the current 5-10 clients a week to 15-20 clients a week
- Start taking on telephone clients to expand your market beyond New York (and make more money)
- Select from and focus on one or two of your current "many ideas" as to not dilute your efforts
- Promote yourself and your services to get new clients quickly
- Increase your number of group workshops
- Get better at marketing them and filling them
- Create "price packages" or programs so that clients stay with you longer and you make more
- Learn how to get new private clients from workshops (existing and future)
- Make more money than you currently make with current clients (raise rates!)
- Create a rate sheet to make it easier for clients to sign up
- Start selling your workbooks
- Get weekly goals, a practical action plan
- Stay accountable

NAME, these are very exciting goals and, most of all they are feasible.
We can start working on those goals as soon as you decide to move forward with the _____ Program and you will start seeing results right away.

Let us know and we will send your Welcome Kit with everything you need to start in the Program - we will schedule our first session and introduce you to our community of entrepreneurs who will be very happy to welcome you in the tribe.

In the meantime, I will send you an invitation for our Follow Up Call on **Sunday, October 14th at 2PM.**

Looking forward to speaking with you soon!

Your name
Your email
Your phone number