

Conducting Confident Consultations

MENTORING WITH GERALDINE



ABOUT

We never got much education on the running of a business, it's understandable, we didn't go to business school!

My family ran business in NZ and I have run businesses for others before becoming a nurse, so I had an understanding of what was needed, and how to keep up with the times.

It's daunting tho, you're suddenly out on your own, no lecturer to help, no one else a desk away to ask questions of, you've got ideas and you start down the road to practice... but things get in the way all the time... one of those things is your confidence, which is why I do what I do!

I love what I do and I love supporting business owners to achieve their dreams in practice more and more, the older and (maybe) wiser I get.



WHAT WE'LL BE DOING -

WHO WE ARE

Let's get the elevator pitch and your description sorted!

DISCOVERY CALLS

First we have to get those folks in the door!

INITIAL APPOINTMENT

Let's break it down and get our scripts sorted, know what we're doing and how to move forward with our client

FOLLOW UP & CANCELLATIONS

Let's not miss a beat with the flow of the consult

FUTURE PACING

Let's break it down and get our scripts sorted, know what we're doing and how to move forward with our client



Household equipment, usually made of wood, metal, plastics, marble, glass, fabrics, or related materials and having a variety of different purposes.

WHAT WE'LL BE DOING -

MIRACLE QUESTION

Let's get our client future focused and ready for change

TESTING & REFERRALS

How to get them on the public purse & how to get them!

CLIENT PLANS

Long.... short.... what to include and what not to include

NICHE & SYSTEMS

What are you using to make things flow?



Household equipment, usually made of wood, metal, plastics, marble, glass, fabrics, or related materials and having a variety of different purposes.

FIRST CONTACT

COMMUNICATION





First contact with the new prospect is what creates impressions,

- How do you dress?
- How do you stand?
- How do you hold yourself?
- How do you speak?
- What do you say?

An 'elevator pitch' is important, do you know your why and can you share it?

COMMUNICATION



WHAT IS YOUR ELEVATOR PITCH? (1)

In a couple of sentences, what are you good at and why?

As a (modality)_____

I help (ideal client)_____

who struggles with/want to be(=their main pain point, where they are now)_____

to achieve(=their main goal, where they want to be)_____

by(=how it is achieved) _____ .

COMMUNICATION



WHAT IS YOUR ELEVATOR PITCH? (2)

I help

Who are struggling with

Through my

So they can

Because I believe

COMMUNICATION

MY ELEVATOR PITCH



MY ELEVATOR PITCH



PLEASE SHARE -

WHAT IS YOUR ELEVATOR PITCH? (1)

In a couple of sentences, what are you good at and why?

As a (modality)_____

I help (ideal client)_____,

who struggles with/want to be(=their main pain point, where they are now)_____

to achieve(=their main goal, where they want to be)_____

by(=how it is achieved) _____ .

WHAT IS YOUR ELEVATOR PITCH? (2)

I help _____

Who are struggling with _____

Through my _____

So they can _____

Because I believe _____

Your client wants to be heard, but we need to structure what we want to hear and then let them decide to see you -

10-15 minutes max!

Use the phone, rather than 1:1 or Zoom so you can do it anywhere. As if they're in with you, remember to nod - positive reinforcement!

Mid point - find focus, develop rapport - "That sounds tough/difficult/unique/ a lot going on, what would you like to achieve, whats your vision for working with me?"

End point - Make the booking - "<name> I've helped people in a similar situation before to create the changes they need, when is a good time to make your appointment" <send link>
< "yes I do have a space then I'll hold it for you for X time">
and/or "what's your credit card number to secure your appointment" or just "is that Visa or Mastercard"?

DISCOVERY CALL SOLUTION FOCUSED



DISCOVERY CALL

SOLUTION FOCUSED



Start - Introduce yourself "Hi ___ it's ____, thank you for booking this 10 minute call,
- can you tell me a bit about why you booked"?

'Tell me what's going on with you"? "Why have you booked this chat today?"

"What is it that you want to achieve"? "How do you want to feel"? "What is your vision for your <insert - future /health /problem>"?

"Have you tried anything before/ What have you tried before"? "What's stopping/holding you back from achieving that goal"?

This conversation is about them and recognising you understand them - not giving the answers!

Empty calendar -

'Before I look at my diary, what time of day works best for you...? Which day should I look at..? or 'What days work best for you... time?'

"Oh you need to change an appointment?"

Add - Oh I have a cancellation on ___ at___ would that work for you?

QUESTIONS CALLS SOLUTION FOCUSED





LET'S PRACTICE TOGETHER...

NOTES...



Initial Appointment

GETTING THE TIMING RIGHT!





Clients expect a magic pill

Expectation of change is unrealistic

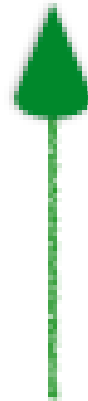
Not understanding client goals

Not working out an achievable time
frame together

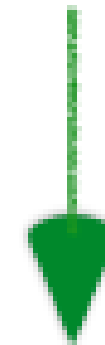
CONSULTATION PROBLEMS

Be practical

1. Discuss next appointments and what to expect.
2. Book followup,
3. Take payment
4. Leave on the hour!



"Tell me why
you've come to
see me today?"
(15 minutes)



Let the client speak

*Share and request -
miracle question
future pacing*

Boundaries & simple
homework (15-20)
- include supps &
timeframes



"What I'm hearing
from you is ____
May need quick
assessment (15-20)

Check our understanding

INITIAL APPOINTMENT

What do you repeat at every appointment?

I challenge you to record an appointment with your client. (remember to ask permission) and listen to yourself,

You're not actually interested in their replies, this is an exercise to see what you talk about, what your flow is like, and how you can use the scripts. Whilst you're there think of handouts for clients rather than repeating yourself at each and every appointment

Consent created - yes/no

Spreadsheet created for collating answers - yes/no.



CONSULT SCRIPTS - START

“Tell me why you’ve come to see me today?”

Then silence! If they need prompting at times try adding these

What are your goals working with me?

What do you want to achieve working together?

Client questions their validity in coming to see you:

"What my clients often tell me is that X sometimes happens before they start to feel better, how do you feel about that?"





CONSULT SCRIPTS - 2ND QUARTER

“What I’m hearing from you is _____

“I just need to clarify _____

“Is it ok if I ask ___”

“You’ve mentioned/said you struggle with ...

“You’ve said ___ so let’s start one change at a time, where do you think we should start?

How can I support you to make these changes?

"What do you think are your biggest challenges to making lasting changes? Ok, let's start there..."

You've mentioned ____ barrier, how do you think we can work together on that?

“Next time I see you...

“At your next appointment...

“When I see you next we will...”



CONSULT SCRIPTS - 2ND QUARTER

Is it ok if I ask this____?

or -

Do you mind if we discuss very personal aspects of your body?

Do you remember a time before you were unwell? - This is the important 'never been well since...' question.

"All changes start with small steps, working on your (diet/lifestyle/habits), we'll also use (product/system) to support these changes, how are you feeling so far about what we've discussed?"

“Next time I see you...

“At your next appointment...

“When I see you next we will...”



CONSULT SCRIPTS - 3RD QUARTER

Next time we'll talk about testing, today is a fact-finding mission. I can see that a (Hair test/blood test/stool test etc) might be a good, but we can discuss that more next visit, if you fill out these forms when we finish today we might just be able to avoid/reduce the test needed and the costs involved ...

Don't worry if you don't get everything done, what I'd like in the long term is that ----

One thing at a time, I struggle to make changes, myself, let's just start with this one meal, when you're ready then we'll work on---

ultimately we'll work on you having ___ breakfast ___ for lunch and the dinners we're discussing

“Next time I see you...

“At your next appointment...

“When I see you next we will...”

CONSULT SCRIPTS - END



As you've described ___ it's important we start working on (diet/lifestyle) as that will be supporting/changing the underlying problems you've described...

"I'll need to see you fortnightly for 6 weeks, then we should be able to stretch it out to 3 weekly*, then we can move them out more as we start achieving your goals... then I usually get the best results with people starting on my program..."

Imagine how you'll feel once you start making these changes, what challenges do you see stopping you or holding you back? - (moving them into future pacing)



CONSULT SCRIPTS - END

I've got a lot of information to work through before I do any prescribing, and some homework for you so I have the fullest possible picture... (here add your boundaries - 24 hour cancellation, refer a friend policy, contact policy)

"We really need to start working at the beginning - natural medicine relies on doing symptom work yes (symptom) but very much on the underlying cause - you've been sick of X years, we estimate 1 month for every year, plus a month to establish change.

"Next time I see you...

"At your next appointment...

"When I see you next we will..."

CONSULT SCRIPTS - END



Let's book your follow up appointment ----

I use (drop shipper) for my supplements, (if it's not in your intake then you need to ask - 'is it ok to share your email address with them?') own language - you'll get an introductory email and list of items we've talked about from them in about X minutes/hours, please follow the link to get what we've talked about and your prescription from me and what we've discussed will arrive in your inbox just before that.

You'll supplements/herbs will be ready to collect from my office as of X day, when is good for you to collect them and I'll let you know and put them out (you need to put a reminder somewhere!)

If you think there maybe issues with them returning: 'I have card ending in 1234 on file that's still correct?' MONEY COMES LAST!



LET'S PRACTICE TOGETHER...

NOTES...



Follow up Appoin[†]men[‡]t

GETTING THE TIMING RIGHT!



1. Discuss next appointments and what to expect.
2. Book followup,
3. Take payment
4. Leave at 45 minutes!



"Hello, how are you, what's changed since we last met?"
(5-10min with questioning)



Allow them to speak, but stay on topic from the last appointment

Going over homework (or just accepting it if no time) reiterate boundaries, present plan/changes.



"Last time we met you said ___ x times a day, that's reduced by ___ x so we're seeing an improvement... (10 mins)

Homework is part of a good prescription, go through it or at least acknowledge it



FOLLOW UP HAS IT'S OWN CHALLENGES -

Keeping your client (and yourself on task and on topic)

- Did you give homework that will need assessing
- Have you created a plan (coming up)
- Have you created a verbal/written timeline of care
- Are you overthinking the whole case? Should you go back to basics by looking at a textbook?
- Does your client need testing - what are the pros & cons, if they can't afford it, what will you do, how will it change your care? (coming up)
- Do they need referrals - templates in your course work



CONSULT SCRIPTS -

What's changed since we last met?

“At your last appointment I mentioned X test, I think we should go ahead with that now/next appointment so we have the results for your follow-up”

“I’m so pleased you’re happy with the results/issue resolution, what we need to do now is improve your ongoing health & environment, my clients really appreciate doing my ___ program now”

“We need 3 perfect periods before we can reduce your supplements and times that I see you, so I’ll need to see you fortnightly for the first few months whilst we settle down you __ symptoms”



LET'S PRACTICE TOGETHER...

NOTES...





CONSULT -

Each time we see a client we tell them something new - something we've researched or know they need to do.

Not every client will be able to make changes between each appointment or implement what's needed and when.

Giving a plan with some outline of how long they can expect to be on this journey is really supporting their changes

Each session we need to reassess, reevaluate and possibly rejig what we and they are doing, it's not about their failure, it's about our skill!



FUTURE PACING SCRIPT

I can see you've worked really hard in the past trying to sort out and I can hear and understand just how difficult it's been for you. (Acknowledging and appreciating them) now we have to think about the next steps to achieving your goals, so we'll need to take a different approach that may be challenging, but it'll be rewarding to finally reach your goals. (Question/agreement/ acknowledgment)



MIRACLE QUESTION

Traditional long version, works well with visualisation:

"I am going to ask you a rather strange question..."

The strange question is this: (pause)

After we talk, you will go back to your work (home, school) and you will do whatever you need to do the rest of today, such as taking care of the children, cooking dinner, watching TV, giving the children a bath, and so on. It will be time to go to bed and go to sleep.

In the middle of the night, a miracle happens and the problem that prompted you to talk to me today is solved! But because this happens while you are sleeping, you have no way of knowing that there was an overnight miracle that solved the problem. (pause)

So, when you wake up the next morning, what might be the difference that will make you say to yourself, 'Wow, something must have happened—the problem is gone!'"

Short version: "If you went to sleep tonight and woke up tomorrow and _____ was gone, what would it look like?"



LET'S PRACTICE TOGETHER...

NOTES...

When wouldn't you use the miracle question?

When would you use it?

Which ideal client would it suit the most?

What alternatives can you think of to the miracle question that would suit your voice?



TESTING & SHARED CARE

HOW DO WE COLLABORATE?





Your client wants to know why they're sick, they want a diagnosis, they want a magic wand to make them better...

It's not our job (legally) to give a diagnosis, we can make suggestions and ask for testing to confirm any differential diagnosis we may have.

How will you get your tests completed via Medicare?

- Referral letter (templates in your cache)
- Get your client to request them
- Create a document for shared care
- Meet local doctors/ physios/ osteo's/ chiro's/ anyone you wish to align with!
- Ethical issues around testing

TESTING



SHARED CARE ...

From one of my old programs -

"Let's get started right away. You may or may not have some blood results from your doctor, if they are very recent then let's use them, otherwise, give your GP a call and book an appointment.

Take this book with you, then your GP can support you on your wellness journey and fill in the results boxes for you as needed.

Your GP may want you to book an appointment with the practice nurse for ongoing support on your journey to well-health, for regular weigh-ins, health checks and support.

Your GP has the same desire you have, that is your wellness, he or she won't jump to prescribe medications or be anything but thrilled that you are taking control of your health and wellness.

Want to see your GP excited?

Then get started right away!"

SHARED CARE

WHAT & WHY

Do we need to test/

If so why?

What rationale do we give our clients to make them spend even more money?

Think before you act...

TESTING

1

DO WE NEED TO TEST?

Does our client have test results already?
What will change in our care if we test?
Do we have barriers to testing?

2

PAST TESTING NEEDS TO BE RECENT

How recent is recent? 6 months to 1 year for a background and overview, but not for current treatment

3

HOW MUCH IS TOO MUCH?

does your client have an endless purse of \$\$\$ or can you try treatment first or cheaper treatment - overseas? or Medicare provider

4

HOW WILL THE TEST AFFECT YOUR CARE?

If your client won't have bloods taken would it affect your care? Will the outcome change what you do?

5

WILL THE TEST AFFECT YOUR CLIENT LONG TERM

When we test for children what are we putting them through, but also what are the long term ramifications of your test? When the child grows up will it sue you?

6

DO YOU NEED A COMBINATION OF TEST?

Sometimes its a combination of tests that give the best results - hair test and blood for comparison, can your client afford them all?

7

THINK BEFORE YOU TEST!

Sometimes due to limited resources we may not test or because there's only one thing you'll do no matter what the result!

HOW MUCH IS TOO MUCH?

CLIENT PLANS





Treatment Plan and Prescription

Consultation Date

Practitioner Details:	Patient Details:
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Identified Treatment Goals

Treatment Plan

Stage 1:	Stage 2:
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Laboratory Investigations to be ordered:	Referrals to other Practitioners:
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Medication/Herbal Prescription Record			
Supplement/Herbal	Dose	Instructions	Repeats Authorised

Lifestyle Advice:

Nutritional Advice:

Other Notes:

Treatment plan valid until:
Follow up appointment details:

* Do not exceed recommended dosage.
* Take medication strictly as directed
* If you have any questions or concerns, contact your practitioner immediately

ARIYA PLANS

This is a page more than I give my clients!

Let's chat about what you're giving to your clients...

NOTES...



REVIEWS

WHAT, WHERE & WHY





REVIEWS

When is the best time to ask for a review?

As soon as your client says "Thank you, you've helped me so much" or "I thought about canceling today as I feel so well, but I thought I'd keep the appointment and tell you how good I feel"

Basically anytime they say thank you, you can ask for a review!

REVIEWS



SOCIAL PROOF

Task: Start collecting social proof (aim for 3-5 pieces)

1. Find 3-5 past customers or clients, or people who you've helped to solve this particular problem/achieve this transformation. If you haven't got anyone you can ask, consider who you can offer to help for free in return for a testimonial.
2. Ask them the questions below
3. Edit their answers into a succinct testimonial that follows the beginning, middle and end format (as explained in this week's lesson)
4. Run the final testimonial past the person for their approval

LET'S DO THIS!



CURATING REVIEWS FOR YOUR SITE

Beginning: - What were you struggling with before we worked together? - What was the big problem you faced? - How did it affect other areas of your life?

Middle: - What did you enjoy most about working with me? - How did you find the process overall? - Was it easy? Clear? Simple? Anything else?

End: - What was the end result from working with me? - Have you seen an impact on other areas of your life as a result? - What would you say to anyone else thinking of working with me?

REVIEWS

NOTES...



https://docs.google.com/spreadsheets/d/13muMNecxH8RIGxlQcU-X5GhErqg6hD-ZZ_BGDIAcj1s/edit?usp=sharing

CANCELLATIONS

WHAT DO YOU DO?





Your client doesn't turn up -
Personally I text them - 'Hi, _____ just checking you you're ok
and I'll see you soon for your appointment?'

Your client cancels their follow up - I phone them (if I want
them to come back!) I also analyse their appointment and
think on behaviours and responses then I ring -

"Hi, ____ just checking everything is ok? I'd really like to know
why you cancelled and if there's anything I can do to help?
(let them speak) reiterate "What I'm hearing from you is___"
..."When you first came to see me you described X
symptoms as___ how are they now?"

I take notes and add them to their file, even if I don't have
many clients I don't want to sound desperate, I only want
'my' clients!

CANCELLATIONS

Presentations are communication tools that can be used as demonstrations, lectures, speeches, reports, and more. It is mostly presented before an audience.

COLLABORATIONS

1

HOW DOES YOUR CLIENT FIND YOU?

Are you spreading yourself too thin on social media?
Can you set some times and systems in place to work on your favourite platforms using scheduling tools?

2

WHAT DOES YOUR SPACE LOOK LIKE?

When the 'come in the door' - virtually or physically - what do they see? What is their experience?

3

HOW DOES YOUR CLIENT BOOK IN?

Is this an easy process? In Podia you can see my Acuity system, many use Simple Clinic, what are you using? does it flow for your client & yourself?

4

HOW DO YOU TAKE MONEY FROM YOUR CLIENT?

What banking / credit card systems do you use? Is it easy and quick? Do you immediately tell your client you'll give them a discount?

5

HOW DO YOU REBOOK YOUR CLIENT?

Again, how easy is this process? What reminders do you have in place, what are your strategies to re-activate clients? Are systems in place for cancellations?

6

DO YOU HAVE A MAILING SYSTEM?

How do you keep in contact with your clients when things change and they don't need you anymore?

7

DO YOU HAVE RESIDUE INCOME?

Have you looked at what you repeat? Have you looked at developing programs on the side of your business to avoid repetition!

DISCUSSION

WHO, WHAT, WHY, HOW...



NICHE & SYSTEMS



WHO & HOW



NICHE & SYSTEMS



NICHE GROUP

Who is your target group?
How else can you reach them?

OUR SYSTEMS

Let's look at our systems and see what need improvement.



WHO IS YOUR IDEAL AUDIENCE?

Let's look at our audience together - do you have a particular question you'd like answered here?

WHO ARE THEY...

NOTES...





OUR SYSTEMS

Let's look at our systems together - do you have a particular question you'd like answered here?

HOW TO...

NOTES...



WHERE TO FROM HERE?

QUESTIONS?

Academy

<https://www.geraldineheadley.com/academy-membership?coupon=ACADEMY>

MENTORING WITH GERALDINE

What's on Offer

Join Strictly
Education &
Support for weekly
trainings

Free Facebook Group

For Coaches wanting
clinical support or Nats,
Nuts & Herbies wanting
clinical or project support

Private Groups

If you're a: new grad, returning
to work, low confidence and/or
low client numbers then there's
a program to suit you!

Programs

For those practitioners of any
modality who want to work with me
privately in my 90 Day Program

1-1