



Business Success Solution

Step Into Your Greatness

Loren Fogelman

Guided Value Conversation

- When utilizing this guide, sections that are in brackets and highlighted yellow are [areas where you insert your language] to make this conversation your own.
- Sections that are **bold** are Loren's examples of what to insert.
- Items that are in brackets and highlighted green are [items that you need to identify and insert by listening to your potential client].
- Items that are ***bold and italicized*** are actions for you to take.

Opening / Set the Intention

Hi, **Sandy** [insert name]. Thanks for meeting with me today. My intention for our conversation is to identify the one thing that will give you the best insight regarding your **business finances, cash flow and tax planning**. [insert outcome you provide/problem you solve] First I will ask you some questions and then we'll take a look at where to go from there.

Before we get started do you have any questions for me? Great, let's get started.

What made you decide to invest the time today to talk to me about **your cash flow and taxes**? [insert the solution they want and that you solve].

Tap Into the Pain / Expose the Gap

Exactly what was your **gross income** last year and how much would you like to **make this year**? What are your specific plans to make your **business more profitable**? [insert other specific measure of success related to the problem you help solve]

Exactly how much time and money have you spent to **improve your cash flow and keep your books up to date for tax planning** this year? [insert pain point of other things they may have tried to fix problem you solve]. Is that paying off? If not, why?

Exactly how much revenue have you lost by not **knowing where your money is coming in or going out and being advised about tax-related deductions?** [insert pain point they are likely experiencing].

Aside from **cash flow issues** [insert pain point they are likely experiencing], does this impact you in any other way? Other areas of your life? In what specific ways is this holding you back?

Precisely what else is getting in the way of your **business becoming more profitable** [insert outcome they want to achieve]?

Explore the Hope

Why is it so important to you to **improve your finances now and develop a tax plan?** [insert your area of expertise].

How would things be different if you had insights about **your cash flow and a strategic plan for growth?** [restate an outcome they stated].

What would you be able to accomplish if you improved the **financial health of your business** [restate an outcome they stated]? What impact would transforming this have on your business? Income? Family? Self?

Imagine New Possibilities Together

How would it feel to **finally to have your finances in order and improve your financial health?** [restate their goal/picture of success in this area]. If your **business was more profitable** [insert problem you solve], what would you do that you're not doing now? **What would be different if your cash flow improved and you had a tax plan?** [restate their goal/picture of success in this area].

**Acknowledge how far they have come. Look for ways to bolster confidence.*

Sandy [insert name], you've got so many pieces in place, and have done so much to get to where you are now. When you **improve your cash flow and develop a tax plan** [insert problem you solve] you'll really have the missing piece to a **more profitable business.** [insert transformation you provide].

Offer a Solution (Only if they see the gap)

From our conversation together, how do you think I can help? Do you have any questions? Our work together would focus on **strengthening your cash flow, increasing your profitability and develop tax saving strategies** [your transformation & BRIEF explanation of how to achieve that result – describe 10% of what you do, 90% benefit and outcome] and I think this could be a great way

for you to strategically increase your revenue as you mentioned this was one of your goals for this year.

Moving into your offer: People who take decisive action turn out to be my biggest success stories. To review your accounts and determine the plan to improve your **cash flow and plan for this tax year** [outcome they want to achieve], we start with a **Financial Health Audit** [service you offer] that's where we review your **business finances, gain insight about your cash flow and recommend the next steps for your business** [outcome they want to achieve].

I will only engage with a client if we can agree to our mutual satisfaction that the value we are offering exceeds the price that we are quoting. We want to make sure that this is a win-win.

The investment for the audit is **\$750** [full price for the audit]. PAUSE. Does that work for you? What questions are coming up for you? Ready to get started? The first thing I need is your billing address. ***Let them respond. Be quiet.***

No Pressure / Committed But Not Attached (Use only if necessary)

- I'm not here to pressure you, call us back anytime. The audit is totally worth it. Email my assistant when you are ready and we will see if we have openings.
- Is this something you want to do, but it's just a cash flow issue? Would a couple payments help?
- Sure, when can you talk to your partner? Let's set up a time to check in about what you want to do. It's a quick 10 min call to let me know what you decide. If you want to move forward, we can get it set up then or if you have further questions, I can answer those questions. How about we set that check in call for tomorrow or the day after? Let's set that up now. [give them a specific time and date for them to call you.]

Seal the Deal

It's important not just to invest but to commit. The investment is the easy part. I need to know you are going to be accountable to YOURSELF for the commitment you're making today. As we get started, be sure to read my client's rights and responsibilities portion. That will outline in more detail what you can expect from me and what I can expect from you.