

Enrollment Conversation Checklist

- ___ 1. Did I ask what led them to contact me at this time?
- ___ 2. Did I ask about their previous experience with same/similar professionals?
- ___ 3. Did I focus on the connection and relationship; less on my agenda?
- ___ 4. Did I ask questions and listen the majority of the time?
- ___ 5. Did I reflect back their goals, needs, and challenges?
- ___ 6. Did I tell a carefully selected story about myself or client that helps them know that I understand, relate, and gives them hope?
- ___ 7. Did I provide a "gem" or two of valuable information, feedback, or suggestion to demonstrate my value and credibility?
- ___ 8. Did I ask what they are seeking, want, and need in a helping professional?
- ___ 9. Did I find something about them to be genuinely excited about ("positive mirroring") working with them and verbalize it?
- ___ 10. Did I use my four closing questions?
- ___ 11. Did I use my strategies for countering objections?