The School is Easy Consultation Process

Overview

The School is Easy consultation process is the most effective tool available to us for enrolling students. It consists of four key stages, which allow us to accurately assess the student's and family's needs and make an informed tutoring recommendation based on that assessment. Below, we look at each stage of the process in turn, focusing on what each stage involves and what it aims to achieve.
This guide should be used in conjunction with the other School is Easy consultation tools, for the clearest understanding of the process. (See The Consultation folder in Support Centre)

1. Connect

Connecting with a client is key to building trust, which is important in any sales process because prospects are far more likely to buy from brands they trust. Despite being the shortest stage in the consultation process, connecting with your client is the foundation that the consultation is built upon. The aim is to position yourself as a "*trusted advisor*" during each stage of the consultation process.

1. **Connect**: Connect with the client to build rapport. This helps you to start building trust immediately and it should begin right from the moment you are greeted at the front door. This part of the process should continue through the welcome phase of the consultation, (greeting at front door, taking coats/shoes off, getting a drink, etc.), until you are settled with the family in the room where the consultation will take place.
2. **DISC Profile**: If you are familiar with DISC profiling (Dominance, Influence, Steadiness, Conscientiousness / Compliance), then this is an excellent opportunity to use those skills to help connect with the client. Mirror the client's personality type to enhance the relationship and further build trust. Read more about DISC profiles here.
3. **Set Expectations**: Set expectations for the outcome of your meeting right at the start. Give a brief overview of what you'll cover during the consultation and tell the prospect that if at the end of the meeting they are happy to proceed, the expectation is that you will enrol them (by reading through and signing the enrolment form) and take a payment in order to start tutor-matching immediately. Expectation setting helps avoid confusion and gives the prospect a chance to pull out early, rather than at the very end of the consultation.
4. **3 Main Questions**: The Connect stage ends by asking the client your '3 main questions'. These should follow the PPF (past, present, future) format. See step 5 below, for an overview of why questioning is so important, and our Past, Present & Future Questions – Written Guide to learn more about the PPF technique and why it is key to the School is Easy consultation process.
   (More in-depth PPF questioning will take place in stage 2: Assess).

Asking your "3 main questions" at the end of the Connect stage…

- Helps further position you as a "Trusted Advisor"
- Provides ammunition for following stages of the consultation (Assess / Recommend)
- Provides us with good early information as to the client's concerns, "pain-points" and goals, helping us to steer the conversation and further set expectations for the service
- Gets the client talking – "*2 ears, 1 mouth*"!
- Provides a smooth transition into the next stage of the consultation

"Great salespeople take their prospects on a journey through time. They don't just focus on the present—they focus on the past and future, too." – Steli Efti, Close

2. Assess

The Assess stage allows us to fully understand the prospect's pain-points and goals, and to gather that information for use in the Recommend stage. By asking valuable past, present & future questions (see our Questions Guide) and using the School is Easy consultation resources (learning style assessment, academic quizzes and the academic foundation tool), we gain a clear understanding of what the student and family are struggling with and the help they will need to achieve their goals.

1. **Questions**: Questioning the client (parents and student) is our most powerful tool for gathering information about their needs and pain points. Continue to ask the client questions using the past/present/future technique introduced above. This information should be recorded in the Success Recommendation form* and the Overview Of Information To Be Obtained In The Consultation form, for use later in the process (see stage 3: Recommend). Also, see our Past, Present & Future Questions – Written Guide, Past, Present & Future Questions – Example Questions: Sheet 1 and Example Questions: Sheet 2.
2. **Assessments**: Use academic tests/quizzes together with the School is Easy learning style quiz, to assess the student. These resources should be used as a guide only, to gauge which areas the student is struggling in. The assessments should be completed by the child on their own, without the pressure of adults in the room. This also creates a natural break where you can talk to the parents alone for 5-10 minutes about the student, without him/her present.
3. **Academic Foundation (Building Blocks)**: This exercise is used to demonstrate how by missing certain fundamental concepts in earlier grades/school years, the student's academic progress will be impacted in subsequent years. (See our Academic Foundation – Guide and Academic Foundation – Tool) and refer to the relevant section of your franchisee training.
4. **Summary of Benefits**: This is the opportunity to summarise all of the benefits and USPs of School is Easy, now that trust and expertise have been established. However, do not simply list every single benefit one-by-one. Use the knowledge you have gained through your questioning, to provide 2 or 3 bullet-point benefits relevant to the family. These could include **OPUS 2.0, the School is Easy Tutoring App, the high quality of our tutors, the bespoke tutoring we provide (which is unique to every client), our all-through managed service, session reports & learning plans, re-matching,** etc. Remember, there is a long list of benefits to using School is Easy, but only 2 or 3 will really matter to the client!

*The Success Recommendation form is completed by the franchisee/EC (in conjunction with the Overview Of Information To Be Obtained In The Consultation form) with the information gathered throughout the Assess stage. This information is presented back to the client in the form of a tutoring recommendation in stage 3: Recommend.

3. Recommend

The Recommend stage is where we use all of the information gathered during the consultation, to make an informed recommendation for the tutoring required. Follow the steps below, to prepare the client to make a buying decision. Use the Success Recommendation form that you completed in stage 2: Assess, to visually walk the client through your recommendation, highlighting the two or three goals you created for the student, along with the associated tutoring hours for each goal. By the end of this stage, the client should be aware of your recommendation, be comfortable with the price of the package and be ready to make a purchase.

1. **Test Close 1**: As you are just about to recommend a package of tutoring, it is important to conduct a test close. A test or trial close is a sales tactic that assesses a buyer's readiness to make a purchase decision. A traditional "close" asks a prospect to make a decision regarding their purchase, whereas a test close asks customers to share their opinion. Use open-ended questions to pick up on "buying signals" and gauge where the client is in their buying journey.

2. "**Paint the Picture**": This is where you walk the client through the Success Recommendation form that you completed during stage 2: Assess (To help you with this, you may have used the Overview Of Information To Be Obtained In The Consultation form). This process allows you to visually present the information you gathered from the client, along with your tutoring recommendation for the student. Your aim here is getting the client to understand "*these are the key areas you told us you/your child needs help in, and this is the amount of tutoring it will take to achieve this*". You are using the ammunition the client provided, to make a solid case for the tutoring package you recommend. When done effectively, you should get "buy-in" (agreement) from the client that your recommendation is correct, which in turn, will help you to close the enrolment in stage 4: Enrol.
3. **Investment Grid**: Once the recommendation has been presented and you have received buy-in from the client, you must walk them through your Investment Grid. As with "Paint the Picture", this is a valuable exercise in visually showing the client what the student will achieve with the package of tuition you have recommended, what their package will cost *and* how much discount they'll receive for their particular package. If necessary, you can also demonstrate the different payment options (instalments), highlighting the discounts on each. This will give the client peace of mind they've made the correct decision, helping to avoid *buyer's remorse* later on. This is the ideal place to mention the School is Easy 60-day money back guarantee. These two steps (3 & 4), should *always* be included in a consultation and always in this order.
4. **Test Close 2**: A second test close to confirm the client's readiness to buy, now that you have walked them through the Success Recommendation form *and* the Investment Grid. You have given the client two significant pieces of information (package size and price), and although your technique and delivery in steps 3 and 4 should mean the client is happy with both, it is important to use a further test close to reconfirm they are at the right point in their buying journey to move on to stage 4: Enrol and make a purchase.
   *Be aware that if a client has objections concerning your recommendation, this is a good sign, as it means they are still interested. If they raise objections after the Investment Grid exercise, we know it's more likely to be a price issue and you can start a conversation around payment plans, our 60-day MBG *and* the option to transfer their hours at any time.
5. **Objection Handling**: Objections can arise at any stage, so be mindful that objection handling may be called upon at multiple points during the consultation. However, we deliberately address potential objections at the end of stage 3, especially if the client hasn't raised many concerns. This can be seen as an extension of your second test close and we do it by asking objection-based questions. This allows us to deal with any potential concerns which the client may not have considered, before attempting to close them in stage 4: Enrol.
   *Also see our Handling Objections guide in Support Centre.
6. **Close**: The "Close" is the part of the consultation where you get your prospect to agree to your recommendation (proposal) and sign the enrolment form (contract). It can be seen as the "buy-in" or confirmation from the client that they wish to make the purchase. As we will see in stage 4: Enrol, there are a number of steps to physically completing the enrolment of a student, (for example taking a payment) and the Close is the catalyst for that process. There are several techniques for closing a sale. The technique you choose should depend on a variety of factors such as client type, client communication style (see DISC profiles above), the product/service you are selling and even your level of comfort in implementing a particular Close. We have outlined the specific Closes that we use in a School is Easy consultation, in our Closing A School is Easy Consultation - Written Guide.

4. Enrol

Enrolling the client is the final stage of the School is Easy consultation process. It is key to "*closing*" the sale and must include two important elements:

1. the client must sign the enrolment form (contract)
2. you must take a payment from the client ("*in order to start tutor-matching*")

It is important to understand that unless you achieve both of the above elements, you HAVE NOT closed the enrolment. However, you will have set the expectations for these two key elements earlier in the consultation (see stage 1: Connect > step 3), which should make this stage more manageable. There are other pieces of important information to gather and activities to complete in this stage, all of which are listed below.

1. **Agree payment plan terms**: You should ALWAYS push for full payment up front from clients. Up-front payments offer the largest discounts to the client and remove the admin burden of chasing subsequent payments. However, this won't always be achievable, so if applicable, confirm payment plan terms (3/6/12 instalments) with the client. You may have discussed this in stage 3: Recommend (step 3), but it is worth reconfirming and drawing the client's attention as you add these terms to their enrolment form. (This is done manually).
2. **Walk through T&Cs**: Walk the client through the T&Cs of the enrolment form (contract), highlighting clauses as appropriate, to ensure complete transparency. This is usually a good time to explain the re-matching process, if you haven't already.
3. **Complete client enrolment form**: Announce to the client "*It looks like you are happy to move ahead, so I just need to complete the enrolment form and take payment/first payment from you*". Explain that a payment is necessary to secure the tutor that you have lined up (and are certain is a perfect match for the student!), before they become unavailable. Use Client Student Enrolment and Agreement [template]_v2 to enrol clients. You should keep a supply of printed forms in your franchisee consultation kit. The form will also be available online in OPUS 2.0 for digital completion.
4. **Take a payment**: Take the payment you agreed on above from the client, using a portable terminal or bank transfer. Try to avoid cash or cheque payments. It may be that the initial payment is a deposit only, rather than a full first instalment, but this is perfectly acceptable. Remember, taking a payment is a critical part of the enrolment process and you have NOT closed the enrolment unless this step is complete.
5. **Gather tutoring details**: such as tutoring day/time, start date, session length, number of sessions per week, client contact details. On completing the enrolment form the client may not have specified these and it is important you obtain them in order to start tutor-matching.
6. **Reassure the client**: Reassure the client they have made a valuable decision that will positively impact their child's life. Confirm that because you have taken a payment, you will start tutor-matching immediately and that their tutor will be in touch shortly to introduce him/herself. Reconfirm you have all client contact details and thank the client for their time.

Ending the Consultation

After you have closed the sale and enrolled the student, there are various tasks you need to complete to end the consultation correctly. These activities may seem trivial, but it is important not to skip them as they help us to achieve some important goals, such as solidifying the consultation and driving new leads for our business.

1. **Ask for referrals**: Asking for referrals is an essential part of any consultation. Whether you close the client or not, it is important to drive referral business early in the relationship. You should incentivise prospects to provide you with leads, in return for a specified reward (if the lead enrols), such as free tutoring hours, cash, or gifts. This is done at the end of the consultation once trust and expertise have been established, value demonstrated, and to avoid spoiling the sale.
2. **Walk through *Consultation Pack***: Show the client the contents of their consultation pack, which should include as a minimum: a *Welcome to School is Easy* letter, a referral promotion leaflet (see referrals above) and print collateral, your business card and some promotional collateral (such as a pen, bookmark, fridge magnet, etc.), a list of the School is Easy benefits / value proposition, any educational collateral you think may be valuable to the family (such as blank copies of the learning style assessment/academic quiz/building blocks activity, one of our educational blogs, information on developing executive functioning skills, tips on home learning, etc.), a list of testimonials from satisfied clients, a case study of a client success story. Providing the client with valuable content will always help avoid buyer's remorse (if the client has enrolled), further establish you and your brand as a trusted advisor (whether the client has enrolled or not) *and* help drive referrals for new business. So, **ALWAYS leave a consultation pack with the family whether they enrol or not**.

Post-consultation notes:

- Pass the client enrolment form on to your office admin, ensuring the new client is entered into OPUS 2.0 the same day.
- Begin tutor-matching immediately.
- Pass the consultation details on to your chosen tutor and ensure he/she contacts the client straight away to introduce themselves.
- Your tutor should then start creating the student learning plan immediately, passing it on to you for review, before you send it on to the client. (This adds value straight away and helps prevent "buyer's remorse").
- Oversee the process to ensure tutoring starts as planned and the first sessions run smoothly
- Create a client management plan, to check in with the client and review tutoring.