



Session 6

Avoiding Pitfalls +
Getting Started Finished

Austin L. Church



Session 5 Recap

- We **lead** strategy clients **before, during, and after** sessions.
- A **thoughtful client experience** contributes to the perceived value of the engagement.
- Your job is not to find and fix all their problems; your job is to help the client get **clarity, confidence, and traction** by making decisions and taking initial steps down a path.
- Take the time to **design your session in advance**, including premium client experience, facilitation, and report delivery.

What We'll Cover

- Potential Pitfalls
- Getting Finished

Potential Pitfalls

// Mindset

Inertia

- Some of you will be tempted to wait. The rationale will be, "I'm too busy." "I'll come back to this when I've got more brain space." "I'm not ready yet."
- Here's a secret: **There may never be a convenient time. You'll never feel totally ready.**
- The only way to home in on your best strategy offers is to put yourself at there and pay attention to what does and doesn't work.
- **Take action ASAP.**

Insecurity

- A lack of confidence trips up all of us from time to time
- Anytime I reach up, try to step up and sell a more expensive strategy engagement, a slightly different strategy, I bump into my insecurity.
- The only way to grow your confidence is through doing, not thinking about doing. The only way to get better at this is through trying and making mistakes.
- Confidence can be cultivated through patient application of discomfort. Discomfort points the way.
- **Eventually, you just have to go for it. So go for it.**

Imposter Syndrome

- Everybody has imposter syndrome to some degree. It doesn't go away.
- Imposter syndrome puts all of the focus on your supposed flaws, your lack of experience, the gaps in your capabilities and expertise.
- Imposter syndrome is a liar. You certainly have flaws, but **no one's waiting for you to fail.**
- You're not on a stage with a panel of judges or critics sitting out in the audience, evaluating your performance, and writing down critical notes. **Strategy engagements are not an audition.**
- When your clients come in, they will sometimes be exhausted, sometimes relieved, sometimes excited, but regardless your job is to help them get clarity, confidence, and traction.

Originality

- There's nothing new under the sun. Great artists steal. You don't need to be original, and certainly not right at the start.
- You don't need to provide a groundbreaking, revolutionary new strategy offer. You don't have to develop your own methodology. You can **use my tools or find other ones online.**
- **Start with the offer you think will be easiest** (aka, most comfortable) for you right now.

Discouragement

- Maybe the first client to whom you pitch strategy will say yes. Maybe she won't. Regardless, keep going.
- You are a scientist in a laboratory. A good scientist makes a hypothesis and takes messy, imperfect action.
- **A good scientist depersonalizes the outcome.** The "failed" in "failed experiment" applies to the experiment, not the scientist.
- **Give yourself 1 hour to be disappointed, then move on to the next experiment.**

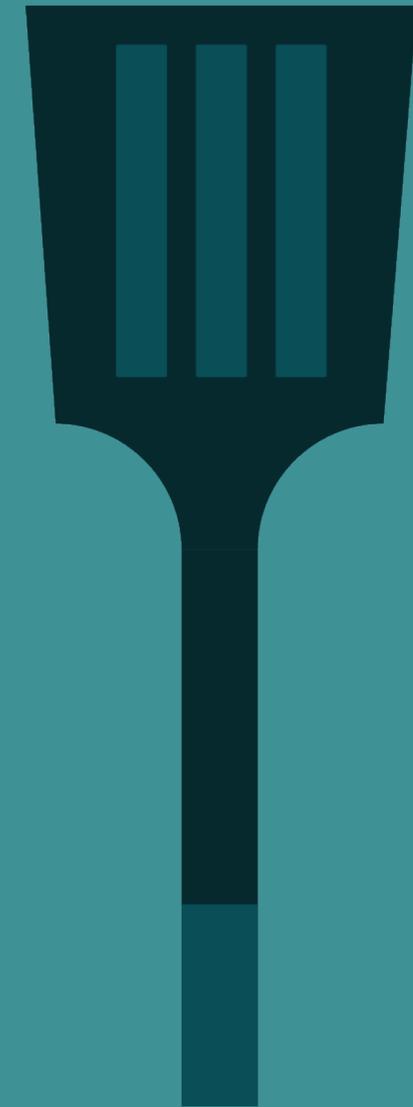
Second Guessing

- When you're new at something, you second-guess yourself. My advice? Don't assume you're doing something wrong.
- **To be the expert, you only have to be one lesson ahead.**
- Try not to fret over how the client is feeling about the "value." Just focus on the outcome you agreed on with the client.

Perfectionism

- Perfectionism's underlying assumption is that waiting longer means making fewer mistakes. And fewer flaws and blemishes in your launch, or whatever you want to call it, will produce better results. So to avoid failure, you wait longer to launch anything, do anything.
- Perfectionism doesn't deliver on its promises. The antidote is messy, imperfect action. **Launch before you're ready.**
- A process of elimination and trial and error is unavoidable in business. When you let perfectionism cause you to not take action, you're denying yourself your own education.
- **The key is to get more experiments, more reps, more bets, more cycles in as quickly as possible.**
- Then, you have real market feedback you can use to iterate your offers until you start getting yeses and the offer becomes easier to sell.

-
- **Perfectionism does not contribute to your financial welfare or the client's prospering. Messy, imperfect action does both.**
 - Look around you: People who do worse work are already charging more than you. People with less expertise are already doing projects with clients you'd love to have. People with less talent than you are already selling strategy.
 - So choose yourself and get moving.



Overpromising

(aka, Anxiety About Results & Value)

- Your job is not to find and fix all of the client's problems. Your job is to help the client get to the root of one problem, need, or opportunity. Then, you help them get clarity, confidence, and traction. You help them make choices and take steps.
- **Getting a client out of stuckness and into motion has incredible value.**
- Even if the path that they take ultimately isn't the best path, the only way they're going to find that out is if they start walking. Sometimes the only way to find the right path is to take the wrong one.
- A process of elimination is unavoidable in business. Clients aren't going to blame you for not being able to predict everything they'll learn on the wrong path. **Both parties make the best call based on the information they have at the time, and they go from there.**



Remember...

You help clients get clarity, confidence, and traction.

→ You don't have to let the strategy session run long.

→ You don't have to capture every single thing discussed.

Your report should not be a transcript of the session. Your report create value by skimming the cream off the top, the best insights, and presenting the actionable plan. A report that is accurate and comprehensive to the point of being difficult to use is less valuable.

Shorter reports are often more valuable if they're easier to consume and use.

Potential Pitfalls

// Delivery

Hands Work Paradigm

- You'll be tempted to slip back into Hands Work and turn strategy sessions into execution sessions. Resist!
- How long it takes you to deliver the session and report doesn't matter. **The value for the client isn't tied to time you invest.** It doesn't matter how long it takes your car repair shop to put a plug in your flat tire. What matters is the working tire.
- What matters to clients is clarity, confidence, and traction.
- Keep moving forward with the new Head Work paradigm and sell the hands work as a separate engagement.

Improvisation

- Some of us are good at improvisation. Some of us aren't. Regardless, don't shoot from the hip. **Go into strategy sessions over-prepared.**
- I like to have too many questions and too much structure so that each session feels to me like I'm coloring inside pre-drawn lines. **When you see the complete picture, clients see you as the authority and guide.**
- Knowing what else you need to accomplish in the time remaining gives you permission to interrupt, as needed, to keep the session on the rails or to follow a few rabbit trails if you've still got plenty of time. In both cases, structure brings confidence.

DIAGNOSE	DISCUSS	DECIDE	DEFINE
<p>"Let's restate why we're here...."</p>	<p>"You already tried Z. What were the results?"</p>	<p>"What I hear you saying is that P is the best path forward?"</p>	<p>"It seems like the first step is C. Would you agree?"</p>
<p>"Okay, so if we got clarity and came up with a plan for X, then you'd leave satisfied?"</p>	<p>"You're interested in A, but clearly something has held you back. Let's dig into that."</p>	<p>"Let's talk through the blockers, needs, and tasks."</p>	<p>"Before you can E, you have to D, right?"</p>
1	2	3	4



Format & Flow

5 Minutes → Get settled, restate the goal, and quickly review the agenda.

10 Minutes → **DIAGNOSE** the root problem, need, or opportunity, as needed.

15 Minutes → **DISCUSS** the various paths forward.

10 Minutes → **DECIDE** on the best path forward.

45 Minutes → **DEFINE** next steps and actionable plan.

5 Minutes → Wrap up and explain next steps.

Moving Target

The target can move before or during strategy sessions.

Here are 3 ways:

1. A client decides last-minute that the agreed upon outcome is no longer the outcome.
2. A client gets excited about your capabilities and starts peppering you with irrelevant questions, regaling you with irrelevant tales, and asking your advice on everything under the sun.
3. You get sucked in and start cataloging all of the client's problems.

You're not on the hook to find and fix all the clients problems. Your job to bring the client's attention (and the session's focus) back to the one need, problem, or opportunity the two parties agreed upon. **Your job is to help the client achieve one important business outcome. (Trust me, they'll thank you later.)**



Absolve yourself.

On rare occasions, it makes sense to torpedo your own agenda and go with the client's new priority. I can't give you perfect advice about knowing when to pivot, but I can give you this language for getting a verbal commitment on the session's new direction:

“What you want to focus on now is D, and not C that we agreed upon? You’re saying that using today’s session on D will be more valuable to you?”

You essentially make them take responsibility for torpedoing the agenda so that you absolve yourself of that responsibility.

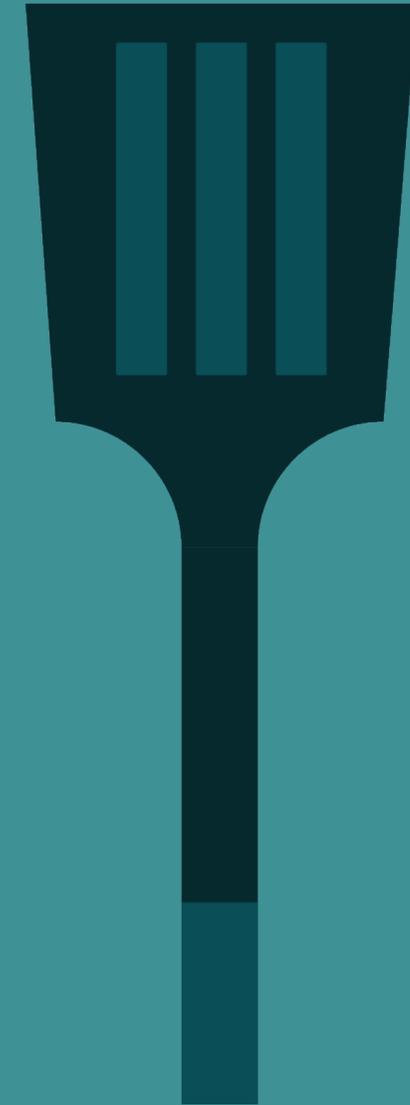
Three different personality types may try to hijack and lead the session to the detriment of the session:

1. Some clients are captains **accustomed to steering**. It's their default. If they sense you don't have control, they may try to take the wheel. When they prevent you from leading, they're hurting themselves. They make it harder for you to help them get clarity, confidence, and traction.
2. Some clients are passionate and **excitable** and want to riff on every interesting idea that comes up.
3. Some clients are very **talkative**. They will want to explain every aspect of the business as they they were singing a child's praises. Forty-five minutes in, you realize, "Wow, we haven't even finished the overview!"

With all three personality types, you have to know in advance what you will say when a client gets distracted by shiny objects.

Client Hijackers

-
- "Let me put you on pause for a second."
 - "You said we were here to talk about **OBJECTIVE**. I want to be sure that you get what you came for. Let's icebox this for now, and if we have time at the end, we can return to it."
 - "What I hear you saying is [fill in the blank]."
 - "Let me repeat back what I've heard...."



Potential Pitfalls

// Growth

Inconsistent Marketing

- The best offer can win you new clients if you don't put it in front of them. Consistency trumps everything in marketing.
- **You need a marketing plan and a marketing habit.**
- When things just don't seem to click, you need to take the time to figure out why: Is it your niche? Your positioning? Your offers? Your strategies? Sometimes, we simply need to start fishing in a different pond.

Once we finally get our sea legs, it's tempting to relax for a little while, enjoy the new feeling of stability. My advice would be this: Don't get comfortable.

Let discomfort point the way.

1. Think of the next strategy flavor beyond your starter juicy offer. Then, right-size your goals. What is the next step up with strategy?

2. Create structure so sessions are fill-in-the-blank. Engineer your own confidence.

3. Put the offer in front of someone as quickly as possible. The sooner you put in the cycles, the sooner you get to another winning offer.

Playing It Safe

Getting Finished

Get it to cash.

1. Pick your starter strategy flavor—i.e., the one easiest for you.
2. Write the crappy first draft of your juicy offer.
3. Finalize your structure, including premium client experience, facilitation, and report delivery.
4. Gather your initial set of questions.
5. List stuff you still need to deliver this engagement.
6. Assign specific tasks to specific days in your calendar.
7. Pursue opportunities you already have with past / existing clients or in a new niche.
8. Brainstorm 10 people.
9. Email them to ask for 5 minutes of their time.
10. Get feedback on your offer and iterate, as needed.
11. Close 1 person if you can.
12. Set your sales process into motion.

Remember...

It took me around 6 months to sell
my first strategy offer.

You can do better than that, right?!



Mind your mindset.

1. Take messy, imperfect action.
2. Depersonalize the outcome.
3. Pay attention to what wants to happen.
4. Iterate over time.
5. One data point is not a trend.
6. Raise the price because price is perceived value.
7. When a client pushes back on price, shrink the scope.
8. Be patient.

Further Reading

The Business of Expertise by David C. Baker

Million Dollar Consulting by Alan Weiss

The Charisma Myth by Olivia Fox Cabane

The Coaching Habit by Michael Bungay Stanier

Thank you!

