# SOAP & Frogs

and Getting the MOST Out of Your CRM



Nancy McLain





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and Getting the MOST Out of Your CRM

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•"Why are you here today?"





- •"Why are you here today?"
- •"Let's take a look."







- •"Why are you here today?"
- •"Let's take a look."
- •"This is what I found."

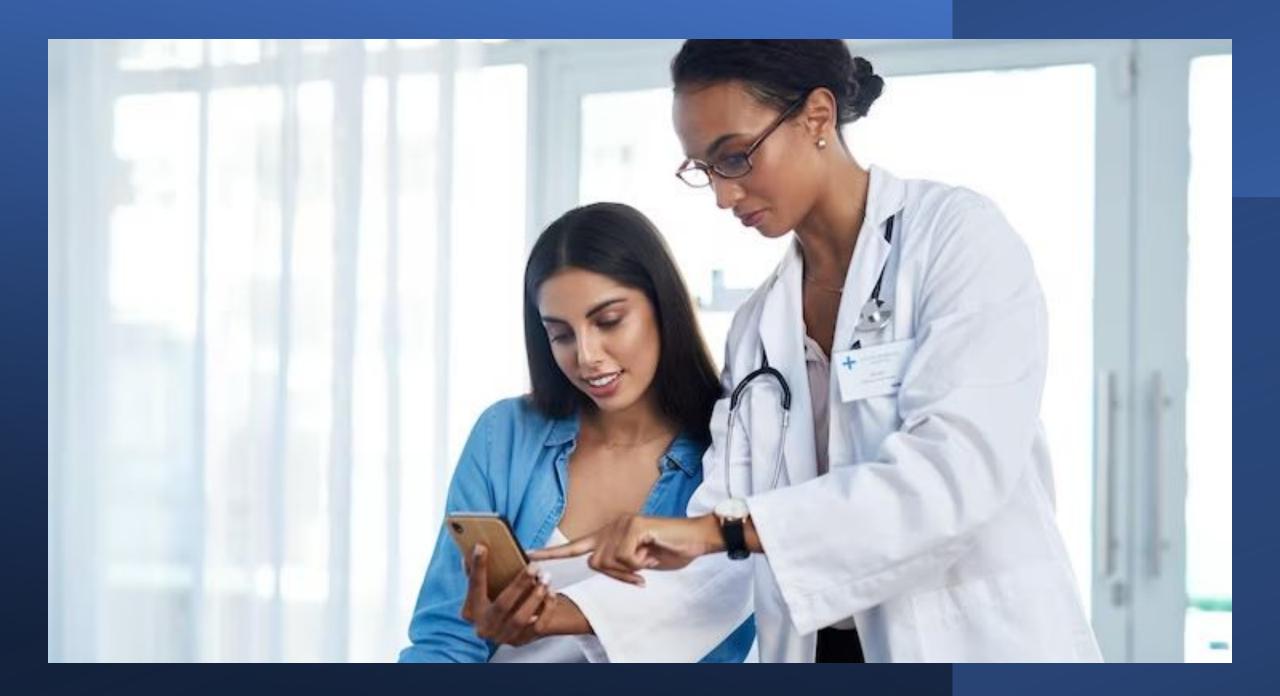






- •"Why are you here today?"
- •"Let's take a look."
- •"This is what I found."
- •"My treatment plan is..."









- "Why are you here today?"
  - They want to hear what you are SAYING?
  - In your own words
  - Using your descriptions





- •"Let's take a look."
  - They OBSERVE your condition
  - Confirm what you have said





- "This is what I found."
  - They provide an ASSESSMENT
  - Using their knowledge & expertise





- •"My treatment PLAN is..."
  - They share next steps
  - Give homework
  - Moving forward...



Approach consulting with SOAP



Approach consulting with SOAP

More efficient



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More efficient



Better ongoing service provided

Approach consulting with SOAP More efficient Provides better ongoing service **Best Practice** 







#### Leave a Legacy







FOR YOUR TEAM

FOR YOUR CLIENTS

FOR YOUR PROFESSIONAL REPUTATION















But how did I get to Frogs?

#### **Under-Reporting Business Starts**

She contacts you

•Intake form

Business information



## You help her

- •Upgrade her business plan
- Obtain financing
- •Increase online market share



### She loves you

- Success story
- Speaks at development events
- •Becomes a donor



#### **Hopping Frog**



She contacts you

•Intake form

Business information



#### She has

- an idea
- passion
- ability
- business license



# She does not have

- product
- customers
- location
- employees
- debt



## You help her

- •Upgrade her business plan
- Obtain financing
- •Find a location
- Market her grand opening



#### Now a Hopping Frog

### She loves you

- Success story
- Speaks at development events
- •Becomes a donor





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