

SOAP & Frogs

and Getting the MOST Out of Your CRM



*Nancy
McLain*



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Nancy McLain

NMcLain@CenterDynamics.com

844.890.4976 desk

505.449.8367 cell





What is SOAP?







What is SOAP?

- “Why are you here today?”



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- “Why are you here today?”
- “Let’s take a look.”





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- “Let’s take a look.”
- “This is what I found.”





What is SOAP?

- “Why are you here today?”
- “Let’s take a look.”
- “This is what I found.”
- “My treatment plan is...”







What is SOAP?

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



What is sOAP?

- “Let’s take a look.”
 - They OBSERVE your condition
 - Confirm what you have said



What is SOAP?

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



What is SOAP?

- “My treatment PLAN is...”
 - They share next steps
 - Give homework
 - Moving forward...

The Best Meetings Have an Agenda

Approach consulting with SOAP

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Approach consulting with SOAP

More efficient

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More efficient

Better ongoing service provided

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Provides better ongoing service

Best Practice

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Best Practice

DOTR recommended

Leave a Legacy



FOR YOUR TEAM



FOR YOUR CLIENTS



FOR YOUR PROFESSIONAL
REPUTATION



Take Credit
for the Work
You Do





Me



My
Team





*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

Awesome Idea!



She does not have

- product
- customers
- location
- employees
- debt

Awesome Idea!



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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