

Ep #130: Client Filters



Full Episode Transcript

With Your Host

Stacey Boehman

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Welcome to the *Make Money as a Life Coach*® podcast where sales expert and master coach Stacey Boehman teaches you how to make your first 2K, 20K, and 200K using her proven formula.

We're going to talk about client filters today but first I have to tell you I am recording this on my final day of work before I leave for California to go get married. You all have no idea. I am so thrilled. I cannot wait. We have been waiting for this moment for two and a half years. All of our friends and family are meeting us in Napa Valley. We bought new luggage. We have all of our clothes laid out. We're packing today as soon as I'm done with work. And we're so ready. We're ready to get married. We're ready to go out on our honeymoon.

We have all the details finalized. I just can't tell you how excited I am. You're probably going to be listening to this; at the point where you will listen to this I will have already become officially Mrs. Boehman. Now, if some of you all have been confused about that. What is happening? What's her real name? Is Boehman going to be her married name? Is that her current name? Listen, I'm going to tell you the story really quick and then we're going to dive in to client filters.

So when I was in, the year that I did master coach training I was in my coach's Million Dollar mentoring group. And I was also in her 100K group. And I went for a week and we redid basically the entire foundation of our business in a week. We rebuilt the website. I created 200K Mastermind at that event which is so fun. We just had the most incredible opening for 200K and Two Million Dollar group which has been super fun. But we really, I created 200K there. And so we made a lot of decisions that week.

And one of the things that we were deciding is at the time my website was staceysmithcoaching.com. And she was like, "I want it to be staceysmith.com", which is my maiden name. And she's like, "It's so much cleaner." And we looked and it was taken. And then she said, "Well, what's

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your married name going to be?” And I had just gotten engaged. And we thought we were going to get married within a year. And I said, “It’s going to be Boehman.” And she said, “Ooh, Stacey Boehman, I love that name. It sounds so mature and sophisticated.”

And so we looked and no one had the name because it’s a rare name. It’s a German name. And so there aren’t a lot of Boehman’s in the world. And so we decided to go with staceyboehman.com. And we were like, it’s fine, I’m just going to rebrand with my new married name a few months early. And then when we got to wedding planning because I was in master coach training and because I was in Million Dollar Mentoring, and because I was in 100K group there was so much going on with my business while I was trying to scale it that I thought I really need a long engagement.

So we decided to have a longer engagement. And then we finally found the location. And we were still hoping I think for a fall wedding. And they were so booked that we couldn’t get in until the following June. So we were like, “Okay, fine, it’s going to be an 18 month engagement.” That’s probably good since I’m trying to scale my business. And then we get to around 90 days out and the pandemic happens and we have to cancel our wedding and wait an additional year to get married. And so here we are. I have been Stacey Boehman now for a couple of years.

And I cannot wait? Do you know the feeling? When I think about actually being able to tell when I travel, when I use a credit card, when I check-in to a hotel, to actually be able to use my name and call myself Stacey Boehman. I feel unbelievably ready. So that’s what’s happening. I’ve had wedding brain all week and I’m in just a little bubble of love. That’s where I’m at and I’m coming back officially Stacey Boehman. Are you ready?

Okay, let’s talk about client filters. So a client filter is a filter to find clients who will make the best use of your coaching, your coaching container and get the highest results possible, super simple. So clients will make the best use of your coaching, the best candidates for success. And will allow your

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business to make money that you feel really good about because they will get really great results. And the relationship will be really mutually beneficial. And your business won't run you into the ground because you have clients who are making the best use of your coaching.

You have more energy when you're only working with clients who are the best fit for your offer. But this is really important. Client filters for me, especially when you have really high demand take things from being personal in the best way. Our brains tend to gravitate towards people who we like, who are pleasing to us and our personality. And I'm a big proponent of clean unbiased coaching. So it's not a big surprise that I'm also a big proponent of clean unbiased election processes for your coaching, especially when you have a high demand.

If you're going through application processes, if you have the ability to select clients and you have to say no to some clients, if you can't work with all the people who want to work with you. For me I really want to be as unbiased in that selection process as possible. I want to take everything personal out of it because it's not about me. It's about the clients, the program, the container and the results everyone is trying to create.

Now, when you're new and you're creating your first 100K and you have no demand, I mostly say take everyone who comes your way. And the only exception to that is people who are not a good fit for coaching. And we do dive into that inside 2K for 2K if you want to learn about that. People sometimes I think mistake my work on overcoming objections as get them to a yes no matter what.

And the very first module in overcoming objections is when no is the best option and how to spot red flags. And really look for, if someone isn't ready for coaching and needs something more like an intervention therapy or a specialization, a coach that offers a specialization like say for example, trauma.

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So other than people who would not benefit from your coaching and it could actually cause them a negative result or could make their problem worse, if they have depression or anxiety, things like that. If you could actually cause them more harm than good, separate from that, everybody else you want to take.

You're going to learn so much from the most difficult clients, from the people who aren't as resourceful, aren't as responsible, who really push you and force you to create boundaries and all of that. You want those people to come in. They're going to help you determine what your business boundaries will be, what your business rules will be, how you'll run your business, how you'll be a coach. And they really help you determine how you're going to find the people who are the most useful.

The way that I know who will make the most use out of 200K is having – I had no clients also when I first launched it and didn't know exactly how the program was going to go. I was really open to just letting anyone in. And then I started noticing who isn't a good fit. And there were always common ground for those people round, after round, after round. I would say, "It makes sense." And I'm going to talk to you about some of those filters today and give you examples.

But it really started to make sense. This is why this person doesn't tend to do the best in this program when they're in this space or when this thing is happening. And so it really helped me just see this group of people. This circumstance isn't going to do the best in my program. And it really helped me select who would be the best and really look for that as well.

So as you grow you will need to filter beyond just they aren't ready for coaching or coaching isn't the best fit for them, especially if you want to have a really clean business that isn't super high maintenance. And you want to make what I would call smart money, which isn't super high maintenance and isn't bound by a lot of your own personal effort, and handholding, and watching.

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The clients who you have to constantly manage and ask if they're doing the work and be on them, those are not the clients that are going to help you have a business that really allows you to utilize your time in the best way. And this is the other thing is if you want your client result percentage to be high, meaning the percentage of people who get results when they work with me is really high. If you want that you've got to be choosing the people who will make the best use of your coaching. And so you choose the people who will likely do the best, it's really simple.

And I don't like to do that based on my opinion. So this is why I feel so passionately about this is, is I have really taken my opinion out of it, my opinion on someone's personality, their energy, their whatever. It's like I have just a set of filters that we go through and we keep that pretty much black and white. And I like to do that based again on the experience of having run my mastermind many times, coached hundreds of people through it and found the measurable results and clear circumstances that work best in my container and those that don't.

And again it's very black and white which I think nowadays people love living in nuance. But I think nuance is where all of the drama happens and all the thoughts get in the way. So I really like simple, clean, basic thoughts leading to my client selection process. They have all been tested. So your client filter won't be based on theory. You will create one when you have worked with enough people to know what works and what doesn't. So just hear me when I said that.

If you're like, "How do I know if I need a client filter?" If you've worked with enough people to know what works and what doesn't. If you haven't worked with enough people to know what works and what doesn't in a very clear way that isn't where you're having to make it up, but you just are like, "Oh no, I already know this person doesn't work well. This person doesn't tend to do the best in my programs." If you're not there yet, you may not need a client filter other than the simple one of who could actually be harmed by coaching or who needs positive help somewhere else?

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So other than that, if you don't know what works and what doesn't, you may not be ready for it. But this podcast is for the people who are ready for it. Your client filter really becomes what you're going to do differently. So you know what works, you know what doesn't work. And then this is what you're going to do differently is you're going to add a client filter for your next selection process.

So in the first round of 200K I had no other filters. I did have one, it was 25K, or actually at the time I think it was 10K. It was 10K upfront, so just an in full payment was my only filter. Now I have several of them.

And before we dive into them, and I'm only really going to dive into mine so that you have an idea of what mine are so you can start thinking about yours. I do want to point out that I do think this is why the reputation of 200K Mastermind is so good, why we're so well spoken about, why our clients get such amazing results. And why it differentiates us from other programs, this is the main thing. And if you're a business coach I want to help you differentiate yourself as well and this is one of the ways that we can do this.

There are a lot of coaches out there that will take any client that will give them money. And I think that this is a real disservice to the client. People who don't get selected for 200K often thank me later because after they get over their disappointment and the sting of not getting accepted, they always find what I saw, that they didn't see that might have caused them to fail at our container, and spend money that they weren't ready for, and actually set back their success. So it's really – this is so important to hear, it is, your client filter is a protective mechanism for your client.

It's the number one thing I really want you to take from this episode. Client filters protect your client. And they protect you as a business. So I set my clients up for success and I make sure I don't put them in an environment that could hurt them, rather than help them. And when I say hurt I really just mean it can cause them more drama than help them with their drama.

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There are people who coming into my mastermind will have more drama than less drama, who will, it will just add to the things that they are not managing their minds around versus support them to manage their mind around things.

And before you say, “We don’t cause our clients drama”, I want to just offer through experience and wisdom that our job is to look for where our client’s mindset is, where it’s at when they’re coming to us. And decide if our circumstance, our C can have the potential to help or harm. Because we are interacting in a world where circumstances and thoughts often are intermingled, of course we are the circumstance and the client can do anything in their mind that they want to with the circumstance we offer them.

And when I go through my filter with you, of course there are some people out there that could have all of the filters working against them circumstantially and succeed. They are always my exceptions. But we don’t want to set our client filters for exceptions. We want to set them for the rule. What’s common, what most people do, what is the commonness that we find when people are interacting with our coaching? And because I will say when you’re selling a group offer, especially the group becomes the client, not the individual. You have to do what’s best for the majority of the people.

So I, when I think about my group and the experience I want them to have I don’t put people in it that I don’t think will enhance that experience. When you put the group first, and this might sound harsh for some of you that haven’t moved into group yet. But when you put the group first you actually get to help more people get results faster. If you don’t set a container, or a standard, or a filter, you might actually end up helping less people. Your result rate might suffer and you might have trouble growing your brand and your reputation. And you might end up with clients who feel really resentful of paying you.

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And finally what I want to say is that client filters are also ever changing. I have seen 200K Mastermind transform and go through so many stages of growth that some filters have dropped off, some have popped up. I reevaluate my filters almost every round, just to make sure it still makes sense for where the group is. So I'm going to start with an example of that.

We used to require in person attendance. So at the time when our group was smaller if you didn't come and you were the only one you would go into the rest of the round feeling like you missed out, you weren't as connected with everybody. You didn't get what everybody else got. That was what a lot of people who wouldn't come, that's what their experience would be. It would happen almost every time. And that would turn into a spiral of isolation and victim mentality and not enough. And that would turn into the person not doing the program and not getting results.

And I wasn't going to offer refunds because people decided not to come in person. That didn't feel like a good reason for me, if you decided not to come and then put yourself in a spiral of not enough, and then removed yourself from the experience and removed yourself from the relationships, and the learning, and the growth. That didn't feel like a good reason, so I didn't offer that, I didn't allow people. It was required you had to be in person no matter where you were coming from.

Obviously the coronavirus pandemic ended that very quickly. We all had to go virtually and the entire group had the exact same circumstance and had to determine their thoughts about it. And now the majority of the world truly is now used to being virtual. And they have learned to live life not being in person and have survived and adapted. And so I don't know that we'll ever go back to requiring it. The group as a whole has overcome that barrier. They've become bigger than the circumstance in their mind of virtual attendance. So now it's just not part of our client filter.

Now we say, "We want to have a good idea of how many room blocks to set off." So for this next one that we're doing, we're doing it in person and

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virtual. And we ask people, “Hey, are you planning on coming or not? What’s your circumstance?” So that we just have an idea of what to plan for. But now we’re going to have a mix, at least for this next round for sure.

Okay, so here is another filter that I currently have for my 200K Mastermind. I don’t allow you, if you’re in the 200K Mastermind to work with another business coach. So we ask that on the application, “Are you going to be working with another business coach at the time that you’re also in 200K Mastermind?” Now, that’s not the same as having a mindset coach, having a life coach, someone that’s just coaching you on your models, on your thoughts, and helping you clean out your brain.

What I mean is you’re not in another business mastermind or you’re not working with another business coach who is also advising you in your business. For me, and you don’t have to do this if you’re a business coach, but for me I do this because my program has a money back guarantee. You either make 25K or we give you your 25K back. But I can’t guarantee someone else’s decisions, and someone else’s guidance, and someone else’s work.

So what happens when you have two different business coaches who you’re working with on an intimate level you come in and you listen to them and then you also listen, you listen to whatever ends up being the most convenient and feels the best for you, instead of often the coaching that’s the best for you is the hardest. The coaching you don’t want, it feels like when it not right for you and you’re going to have the most resistance around. The shit that really hits your buttons, that’s the stuff you want but you’ll always listen to the stuff that feels good if you’re getting multiple answers.

Now, this isn’t the same for, like we had one of my team flag someone because she’s in someone else’s lifetime business program. And I’m like, “No, that doesn’t count.” It’s fine if you’re in Self-Coaching Scholars for example and you get coached by Brooke on business or one of the other

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instructors on business. That's not the same as being in two masterminds at the same time that are business masterminds or having a one-on-one business coach who has opinions about what you should be doing.

So to keep things simple, to keep not having too many cooks in the kitchen, to be able to guarantee my work, that's what I say. And I say, "If you're working with another business coach, no problem, when you're done then apply for 200K Mastermind." It's a filter and a boundary all at the same time. So what works best for me and what I have found is the best for my students and sets them up for the most success. So that's one of them.

Another one is that you have to be a full-time coach. And I really took to heart this specific filter for my business. I did several rounds where people were working full-time and still building their coaching business. And there were a couple of things that always came with that. There were always issues coming to the calls, being live, being present, not being [inaudible] on the calls. But also issues managing, working and building your business.

And when I thought about the group, remember the group is the number one client and I think this is so beautifully for you all to hear me lay this out. Is, you can see how much thought has been put into all of my filters. I never recklessly filter anyone out of my business. So when I thought about the group, what I want for my mastermind that again differentiates it from any other business coaching mastermind you'll be in as a life coach is that everyone in that group considers themselves a full-time coach is 100% committed and all in for their business.

They're not still building it up while they work full-time. It's not their side gig. It's not their side hustle. Everybody's full-time. Everybody has that level of commitment and seriousness in their business. And my students always tell me how much they appreciate that. Now, we've had a couple of people slip through and this didn't have any mind drama. Again there have been a couple of the exceptions. But for the most part this is one of the most

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important ones I have for my group that creates an environment and a container for my group that my group really loves as a group.

So it's all about them, it's all about their experience. They get to be in a mastermind with all coaches who are doing the exact same thing as them, going through the exact same experiences and have the same level of commitment.

So the next one is, and this has changed a little bit too is I have a revenue requirement. Again this is for who I know will do the best. So the first round I did I let anybody in. There were people who had not made any money that were in the mastermind. And coaching people, and now that I have 2K, especially now that I've coached so many people through that. What I teach for someone who hasn't made any money is so different than people who have made money, and especially 25K.

For me, 25K is around the sweet spot where the scarcity and freak out about not making money starts to wear off and you have capacity in your brain to think of other things other than getting, like I always say before 25K it's like money is water or breath. It's literally like you feel like you can't survive without it and you're going to die if you don't get it. That's a lot of coaches, that's their most extreme drama when they're trying to make money. You're always worried about the next consult, always worry about closing them.

It's all about the sales process, learning how to get someone on the phone and close them and get them paid and started in their coaching program. That's very different. After you've made 25K you have such a different place in your mind. You believe you can make money now. You have evidence to back that up. You've started working with clients. You're proficient in selling on consults, that's not the majority of your drama for most people. You're in a different place. You've made a significant amount of money to prove to yourself that your business is the real deal.

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Now, oftentimes, because I also have the full-time coach filter, that it does require people to have made a little bit more money in their business in order to have both of those things happen. So, some of my students may not be able to join until 50K or 60K. I remember coaching a student once on this about if she wanted to quit her job sooner she had to get her expenses and her life down and then she could also live off of her business. And if that's what she wanted to do she was capable of doing that. That's what I had to do.

But if I had been, at the time I remember where I was in my business, if I had joined a group like this I would not have been as committed when I was still pitching and having to be in the store 10 hours a day. It wouldn't have been the same experience as when I was a full-time coach. And I had enough money coming in to really support me. And I was only doing that in my business and that I would be on every single call ready to go, fully focused on my business, so those two things kind of go hand-in-hand.

Originally we were doing, you had to make 25K in a 12 month period and what we've noticed as the group has grown and as the revenues of people applying have increased, that if it's taken 12 months to make 25K then those students don't do as well and make enough progress as quickly as the other students. So this round, because we had so many applications, we tried out filtering at 25K in the last six months. 25K in the last six months puts you at, at least 50K for the year, meaning you have half of your investment and then you have half profit of your money.

And then if you've done it in the last quarter it already sets you on track for a 100K business. So we set that a little bit higher this time and we're going to test that out and see how our students do if they're coming in at the 25K in six months.

And then one of the things that we added recently to also filter demand because we have so many applications is we ask for the 25K investment upfront on the day of the invite. So you get an invite at 9:00am my time and

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you have until midnight to make that payment. It can be multiple payments but it has to be in that day upfront and we don't really make exceptions. There are very few exceptions that we do for that. And we prepare our students well in advance so that they know that.

So if you're like, "I can never do that." Just know we have when we're opening on our website usually four months before we open. This time we sent out an email, walking people through the application process two weeks before we opened. We also do a video as part of our application. And we had told them, "Go ahead and start preparing that video." So we really give a lot of advance notice for that. And so it really isn't a huge problem. There are always some people who will try to get an exception and they're like, "I couldn't come up with the money."

But for me that also tells me that this is another measurable result that they're not ready for the mastermind. When they have it, and it's in their account and they've saved up, and they've earmarked it, and it's ready to go, and they've called their bank, and they've prepped their bank. That's the person, their thoughts, that mindset where their brain is in that way, they're going to do so much better in the mastermind. They're going to have so much more success because they're so prepared, they're so committed.

And measurably they really have the circumstance of being at the place in their business, the results of their business is going to interact at the highest level in the mastermind.

Another one I have is, and this is really the last one for 200K Mastermind is that if you're a business coach you have to have made \$100,000 in your coaching business or another business especially if you're promising a financial result in your coaching. So if you say, "I'm going to help you make your first 100K", but you've never had a 100K business and you're at 30K in your business, that's so different. There's a difference between I'm a

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mindset coach for business owners versus I'll help you make your first 100K, promising a result you haven't achieved yet.

For me what I know to be true about me as a coach and there are different coaches that will have different stances on this. But for me if I'm coaching someone who says, "I've only made 30K ever in business and I'm going to help you make your first 100K", for me if you come to me and you're like, "I'm not getting enough consults, I'm not closing clients on the consult."

Every business problem you have, every problem you have making money, my answer will always be, "Because you can't fully communicate their problem and the solution because you haven't been all the way through the problem and used the solution to create the result for yourself." So that's always the reason you're not making the money one. For me that's the only answer I can ever give you. I don't think you need me to pay you 25K to tell you that. I usually do that for free. You're welcome. That's just what it is. I'll never have a different answer for you.

I can help you with your copy all day long but it won't be the reason that you're not making money, it'll be because you're promising a result you haven't created for yourself yet, a very specific result that you haven't created for yourself yet. And the same would be true really for if you were saying, "I'm going to help people lose 100 pounds", but you had never lost 100 pounds. If I saw that and flagged it I would be like, "Wait a minute", when you're offering very specific results, we just tend to get a lot of business coaches that apply.

And we do have quite a few people each time that apply who don't really match that filter. And we're always super clear, for all of you who are afraid of having client filters and you don't want to tell people no, and you don't want to be wrong or make a wrong decision. For me I always clarify if I'm even confused. I have my team send out a question, I say, "Hey, can you clarify this? Hey, can you tell me more about this?" I really like to be as fair

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as possible in our selection process. But also I take all of the personal out of it.

So I just want you to consider that this is the best thing that you could ever do for you, for your business, for you as a coach and using your brain at the highest capability that you have, for you as a business owner, for managing people, managing clients. And for your client, for their client experience and their potential for success, for all of those things the client filter is the best thing you could ever have in your business when you're at a place where your demand requires you to filter.

And I do think that you can, for certain coaches they will know, even if you're not in a place where your demand is higher than your supply. You still might know these people I don't tend to work with the best with. Or I can tell that this person has a lot going on and this isn't going to work for them. Or I can tell they're not ready. It's not as necessarily as black and white as it's the only – only once you have enough demand that goes above your supply. That's the way I teach it.

But of course if there's something I've said that makes sense where you're like, "Oh my God, I just needed permission to tell someone no, I'm finding that this type of person or this person with this going on doesn't do the best."

Another one that I've really thought about and I'm not prepared to make it a filter yet but I have noticed that people with clinical depression diagnosis or clinical anxiety diagnosis don't do the best in 200K. And that's not something that people are necessarily forthcoming, but I have seen that that can really be a barrier depending on where their level of mind management is. So you might have that for you.

And I just want to offer this might trigger some people but this message really is for the people who need to hear it, is it's okay to tell people no. And it's okay to use your best judgment and your best discernment when telling people no and you're not a horrible coach, or a horrible person because

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you tell people no. As long as you're doing it from a place of what's best for them, and for your business, and your group, not who I prefer to coach the most, who I like the most, who I personally feel the most drawn to, which is all about self-service.

If it's not about self-service and it's not about you and your just fave type of person, if it's not about that then it's totally in service for your clients who do say yes and for the people you tell no. It's all about serving them the most. Saying, "I'm going to put your experience", again the people who say yes and the people who you tell no, I'm going to put their experience of investing in coaching above my desire for money. Hear me on that.

It's got to come above your desire for money. When you can get your brain there that I would honor my filter or my standard, I would honor that and walk away from money and say no to money in order to honor that. You're going to be in such a place of sufficiency and service that you will make more money than you know what to do with. That has been my experience with these filters. I have created so much demand for my business. I have such a high reputation for the work that we do. I have such a great experience as a coach working with my students.

My students have such a great experience being in the container. And that to me is the best way to make money. And again, I just want to remind you, if you're really scared to tell people no, I want to offer, I have had people personally come up to me and tell me that me telling them no was the best thing that ever happened to them and I was totally right. And I have those people come back and reapply. And they're like, "I asked myself why I might have gotten told no." Or sometimes we tell them specifically. And they're like, "I went and worked on it and here I am."

And it's been life changing, business changing for them. So it's for them, it's for your clients who you're going to say yes to, it's for the people you're going to say no to, it's for you as a coach, it's for your business. It's for the overall success of the work you put out in the world.

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Alright, that's client filters. I love you all so much. Have an amazing week. I will talk to you next week.

Hey, if you are ready to make money as a life coach, I want to invite you to join my 2K for 2K program where you're going to make your first \$2,000, the hardest part, and then \$200,000 using my proven formula. It's risk-free. You either make your 2K or I give you your 2K back. Just head over to www.staceyboehman.com/2kfor2k. We'll see you inside.