Tech Support, Strategy & CRM Setup

Handouts

Slides:
https://docs.google.com/presentation/d/1nRhS15MFzbUcejawWADbVZJZaWfC_Z7m/edit?usp=sharing&ouid=109125758766441115500&rtpof=true&sd=true

Prompt Cheat Sheet:
https://docs.google.com/document/d/1Vy3Ah-3G6W15dPBOJr2e1d4SxtL70VojPCEOKPCN3Wc/edit?usp=sharing

Exercise:
https://docs.google.com/document/d/1DLnZrU8hcv99BUS8UZ5Nxy046Kz92VOGa5_NZr0oyc4/edit?usp=sharing

Quick recap

The meeting began with a discussion about Stuart's hearing issues and his plans to get fitted for hearing aids, with Warren offering support and suggesting technology solutions. The group then addressed scheduling confusion regarding office hours and the ReInvent event, with Warren committing to provide clarity through an email update. Finally, the class focused on networking and client acquisition strategies, with Warren sharing sales approaches and demonstrating CRM automation tools, while also promising to review Minka's business roadmap and reschedule office hours.

Summary

Stuart's Hearing Aid Journey

Stuart discussed his ongoing hearing issues, which have become permanent after a loud incident involving a phone on speaker. He is scheduled to get fitted for hearing aids and is exploring solutions to continue his work, including using a computer to route phone calls and potentially using noise-canceling headphones or a preamp. Warren offered support and suggested Stuart try the latest macOS feature for real-time closed captioning of phone calls, which Stuart found promising.

Office Hours Scheduling Update

Warren acknowledged the confusion around office hours scheduling and the cancellation of the planned implementation day, which was replaced by the ReInvent event. He committed to clarifying the situation and ensuring an email update is sent to address the disorganization. Minka confirmed her availability for office hours and the ReInvent event, while Stuart expressed concern about the lack of timely communication regarding the schedule changes. Warren promised to follow up with an update by the end of the day.

Automation Tools for Client Acquisition

The group discussed their progress on networking and client acquisition strategies. Warren shared his belief in the effectiveness of reaching out to 100 potential contacts and emphasized the importance of maintaining consistent contact to secure clients. The class decided to focus on implementing automation tools in their CRM, specifically GoHighLevel, rather than covering best practices for client conversations. Stuart expressed his preference for this technical approach, while James and Minka were open to either option. Warren offered to provide a summary document of the planned automation class for those interested in the technical aspect.

Networking and Sales Strategy Insights

Warren shared networking and sales strategies, emphasizing the importance of listening, understanding clients, and consistent outreach. He introduced a personality assessment tool to help individuals determine the best networking methods for them and provided a step-by-step guide on using GoHighLevel CRM to track opportunities and automate follow-ups. Stuart highlighted the value of using dashboards for managing larger client lists, while Warren acknowledged that the detailed tracking might seem overwhelming for beginners but becomes essential as the client base grows.

GoHighLevel CRM Pipeline Setup

Warren demonstrated how to set up a basic pipeline in GoHighLevel CRM, including stages for tracking leads and follow-ups. He emphasized the importance of following up with prospects and maintaining professional communication. Warren also showed how to create automations in GoHighLevel, though he had to leave before explaining further. Minka asked Warren to review a business roadmap she created, which he agreed to do and provide feedback on before the next class. Warren mentioned that office hours would be rescheduled and an email would be sent out with the new time.