Offer Creation
Checklist

By Jane Deuber

There is nothing that will aid you more in closing clients with ease than an unshakable belief in what you are offering. The greater your belief that your offers represent appropriate next steps and incredible value, the greater your ability to support them through their fears, doubts, and worries about making the investment of time and money.

Ideally, you will enter each conversation with a variety of possible next steps, so you are able to meet the client where they are in their journey. While you will most likely lead with your “premium” offer, it’s important that you, or your sales team, go in with the intent to find a next step that best suits the client’s needs.

Following, are examples of components that can be included in your offers/packages. Look for three price points that reflect three levels of value and direct interaction with you.

**For Coaches**

* Assessments (allow the client to get a numerical score as to where they are now)
* Surveys (Open-ended questions that allow them to share what they want to shift)
* One-on-One Coaching sessions (Describe the duration and number of sessions included)
* Jump Start Session (First time session where you dive deep into dreams, goals, and desires)
* Accountability Check-ins (these can be with your team rather than you)
* Templates, checklists, and forms supporting your work
* Event attendance
* Private online community
* Live group trainings with Q&A at the end
* Pre-recorded tele-classes and webinars
* Physical product delivered to their door
* Daily or weekly tip email drip
* Access to online resources
* Access to your Resource Partner list
* VIP seating at events
* Bonus access to your past trainings that are evergreen and complimentary

**For High Level Coaching Packages**

* In person VIP Days
* One on one calls
* Text/email support
* Emergency cell-phone access
* High-level mastermind retreats
* High-level mastermind calls
* Access to your golden Rolodex
* Private high-level Google group
* Bonus trainings/products/calls with complimentary experts
* Exposure to your list (via private mailings or spotlights in your monthly publication)

**For Speakers & Trainers**

* Keynote, main stage training, breakout workshop, half day training, all day training
* Pre-engagement client assessment
* Key stakeholder interviews
* Pre-event live tele-training or pre-recorded video training
* Post-event live tele-training or pre-recorded video training
* Post-event VIP mastermind
* Virtual training access to selected group or all attendees
* Free trial access to course material
* Books or printed material
* Awards ceremony MC
* VIP lunch attendance and message
* Complimentary Q&A session during the event

**For Consultants**

Many of the items listed under One-on-One Coaching/High End Offers will apply to consulting packages, as well. Often the differentiating factor is the level of customization, the size of the team you are working with, and the level of expected outcome.

* Key stakeholder interviews
* Written needs analysis and recommended course of action
* Retainer, project, or hourly based packages
* Ongoing coaching with key executives
* Focus groups and market research analysis
* Customer interviews
* Live training
* Keynote appearances
* Outsourced project manager/other role

**Now it’s Your Turn - Create Your Offers!**

In the space provided below, begin to determine what you will include in each of your three offers. Keep in mind the following tips…

* The higher the price, the more value and direct access to YOU will be included.
* Be careful not to match the amount of your personal time with the price point of the offer.
* Look for low cost, zero effort deliverables that your clients will perceive as high value add ins.
* When taking a first pass at what you will include at each level, use the checklist above, listing A, B or C next to the item you will include in each.
* If you have multiple target markets with very different pains, needs and desires, you will need to have multiple offers for each segment.

*For example, if you work with real estate agents who invest directly in your programs for their own personal growth, yet you also work with brokerage firms to come in and train their entire teams, you will need two groups of offers – one for the end user and one for the corporate client.*

**Offer A: Your Premium, highest priced package**

Name it:

Price it:

What’s included?

**Offer B: Your mid-range package that includes personal work as well as leveraged components**

Name it:

Price it:

What’s included?

**Offer C: Your least expensive package that is delivered electronically or shipped to the client**

Name it:

Price it:

What’s included?

**Congratulations!**

Take pride in the fact that you have laid the foundation for creating your enticing offers.