

# Transition Your Current Clients:

How to Gracefully Transition Current  
Clients from Your Outdated Rates to Your  
New and Improved Pricing Structure



PROFESSIONAL  
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ASSOCIATION

## Module 4—Checklist: How to Gracefully Transition Current Clients from Your Outdated Rates to Your New and Improved Pricing Structure

- I have ensured that any decision I have made to “grandfather” existing, long-term clients is not based on uncomfortableness or timidity in raising rates
- With existing long-term clients, I have explained that:
  - Keeping their rates the same is a reward for their long-term business—and their hard work and results
  - These rates are unique to them—new clients should expect my new fee structure
- When deciding whether or not to grandfather a client, I am evaluating:
  - How hard she works
  - What results she is achieving
  - Her value as a success example
  - Her value as a current or future interview guest or JV partner
  - Whether or not her growing expertise is a valuable asset to any membership clubs or groups I am running for high-end clients
  - Other \_\_\_\_\_
- I understand that:
- Payment Plans are handy tools to attract dream clients who otherwise couldn't afford me... right now
- I am doing my dream clients a favor by making payment options available
- I have made sure my clients understand that Payment Plans are to be treated like non-refundable retainers, and will be collected at the specified fixed intervals—whether or not a client cancels or wants to put their coaching “on hold”

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- I have made sure clients understand my Payment Plan terms up front
- I have reminded them again at the end of their complimentary session
- I have relieved the pressure of “closing sales” by adjusting my mindset to understand that all the “selling” has been done—I am now merely offering helpful payment or package options
- I have anticipated closing questions or objections, and have decided exactly how I am going to handle each one
- I have pre-decided when it is best for me to “walk away” from a client
- I will resist the urge to keep pushing to “close the sale”—instead I will focus on one of the following alternatives:
  - Moving on
  - Maintaining a positive continuing relationship with that potential client
- I have provided alternative options:
  - Affiliate products
  - Lesser-priced, self-serve options
  - My free, entry-level membership site
  - A Facebook Group
  - Other \_\_\_\_\_
- I have pointed out that her investment in my coaching offers are likely to bring big returns that dwarf the investment, should she take action on our discussions/my suggestions
- I am focusing on my benefits and advantages
- I am keeping an eye out for warning signs that this caller is someone I should discourage
- I have ensured my programs, products and packages are not static, but are tweaked/created responsively in reaction to client input and need
- I am looking for new package, product or program ideas in my existing clients’:

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- Wishes she expresses
- Questions she asks
- Complaints she makes
- Other \_\_\_\_\_
  
- I am creating or tweaking offers by observing and anticipating client:
  - Needs
  - Growth
  
- I am creating high-end packages, products and programs that will:
  - Greatly reduce the hours-for-dollars model
  - Greatly increase my income and profits
  - Really delight and satisfy my clients
  - Keep pace with their growth
  - Other \_\_\_\_\_
  
- I understand that wealthy clients usually like to cut right to the chase. They are interested in:
  - Getting things done
  - Accelerated progress
  - My personal attention
  - Saving time
  - Results
  
- I am creating high-end additions to my offer roster that will help them fulfil those objectives
  
- I am creating regular high end events such V.I.P. Days and Masterminds retreats at regular intervals during the year
  
- I have made sure the intervals are far enough apart to make these events feel exclusive and rare opportunities that can't be ignored

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- I am dispelling any reluctance within myself over charging high-ticket prices for V.I.P Days by:
  - Dividing the time they take by my hourly rate
  - Factoring in my costs and expenses
  - Factoring in my experience, skills, status, et cetera
  - Factoring in demand for my personal time
  - Other \_\_\_\_\_
- If I am using a webinar service to record and handle these calls, I am ensuring beforehand that:
  - I know what country my caller is calling from
  - I have given them any country-specific lines
- All my offers—including my high-end, big ticket offers—possess:
  - A single focus or goal
  - A strong identity
  - A catchy, energizing name
- I am maintaining a healthy relationship and JV-ing with former clients who are now successful and out on their own
- I have done my best to drive away time-suckers and energy vampires—and attract fun, high-level clients who will really appreciate my coaching!