# The 3P Consulting System Client Flow v5

Preiser Consultants
Developing *Smarter* Leaders, Teams, and Organizations

*Step 1:*
**Generate an Inbound Inquiry**

- Your Brand And Website
- Networking Groups
- Content Creation
- Paid Advertising
- Social Media Marketing
- Free Assessments
- Local Meetups & Speaking
- Add clients to Autoresponder

*Step 2:*
**Create a Client By Performing The Examination**

- Offer Examination
- Executive Coaching
- Organizational Development
- Perform Complimentary Executive Coaching Call
- The Vital 33 Questionnaire
- One on One Sessions
- Focus Group

*Step 3:*
**Provide a Diagnosis & Introduce Your Treatment Plan**

- Clearly Identify Top 3 Challenges
- Tell Client I Will Share A Proposal With You
- Get The Client To Affirm
- Send The Client A Proposal
- Share The Possibilities
- Get The Client To Sign The Agreement

*Step 4:*
**Administer The Treatment Plan, Evaluate, Adjust, And Achieve Objectives**

- Establish Point Of Contact
- Evaluate The Progress
- Establish Place Of Work
- Make Necessary Adjustments
- Start Scheduling Meetings, Surveys, Training
- Continue To Administer The Treatment
- Achieve Top 3 Client Objectives

*Step 5:*
**Debrief The Client & Get Client on an Ongoing Engagement**

- Review The Results With Client After Action Report
- Add To Monthly Newsletter
- Get The Client To Affirm & Check Off
- Identify Next Diagnosis...
- Document Testimonial/Case Study
- Repeat The Process
- Get Client's Permission To Use Case Study
- Ask For A Referral

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