

Jennifer Navarrete: Welcome to the show that shares insights into how you can Build Your Business Once with your hosts, Jennifer Navarrete and Sherry Lowry.

Thank you for joining us today, my name is Jennifer Navarrete, and I am joined here today with Sherry Lowry who is here with us today sharing her 20-plus years of knowledge in what it takes to Build Your Business Once.

Now on today's show we are kind of having that discussion, the hard discussion, that is an important part of business building. We are calling it Client Graduation – Early, how to gracefully conclude a business relationship. Now Sherry, sometimes I hear folks refer to, and I myself refer to this as 'firing a Client.' It sounds so rough and tumble and I would like your model of Client Graduation. Can you go into a lot of detail on how to identify when it is that time?

Sherry Lowry: I am happy to do that. We have had a bit of a pre-cursor in terms of a heads-up of what we will be listening for earlier in the show. We talked about Listening For The Big Five (5). We were positioning them (each of you) then for a bit different focus. By this time you are already working with the Client; you thought it was a good match; you set the scene as well as you could to move through rough spots, or obstacles, ahead of time; you educated the Client how to be in business for you, to go about what they wanted to do and accomplish.

You were pretty sure you had taken pulse on where they were; why this (with you) was the best time for that; why they thought this was the best topic area for them. It isn't working out, symptomology-wise, so to speak. So, what are characteristics of when it is not working out?

First, check your own **energy**. We are primarily responsible for being the guide, the know-how person to facilitate our Client through whatever it is they have come to us to get done. They don't already know how to do this or they would have already done it themselves. Or, they thought they knew or did not, or something distracted or something disappointed.

What you are noticing is that they are skipping meeting with you, or they are showing up late, or showing up not prepared.

I am assuming you give them something to be ready to show up with you next time or meeting about, and it is just not happening or is not happening in the quality that you think you need and they need to really be doing a good job. So

let me make sure I am on-track for where we are heading for you, too, Jennifer. Is this beginning to explain why we are getting to think this graduation time for both of us, me and the Client, you and your Client?

JN: You are absolutely right, I hadn't really thought about the energy. I think it becomes frustrating when you have done the Mind Map, and you have laid out the plan, going along with the plan, suddenly you have a Client who stalls. You have many discussions on how to get beyond that stall, that procrastination, that pain point. For whatever reason, they will not move forward.

So then the plan becomes in danger, so for me it becomes frustration. Point granted, it **IS** their plan. I helped them put together, but my goal is to get them through it so they can have success on the other side, so they can get their key performance indicator of what this project is, to know the success of this project.

You are right, I think it was maybe two years ago when I was just not excited about going and having sessions with this Client any more. It wound up being a lot of repetition without forward movement. Me, I like forward movement for the most part; so do most of my Clients. This particular Client just sort of festered. Didn't really move forward, seemed to enjoy our time together, they were happy to pay me, but I was not to do nothing and be part of it. It seemed to have a negative energy for me.

So, yeah, it just seemed to have a negative energy for me. So, it became move on and I was very happy to do it. There is a talk, a discussion to say: I don't think I am the person to get you to that next level, and I can refer, recommend who can. It is awkward, but once you have that conversation, it is a huge release.

SL: That goes right back to the energy. So, when you notice the energy is blocked in the process and the progress, but you are also not necessarily looking forward to it. Definitely indications of an 'early graduation' could be in order.

Your energy is shifted in relationship to this whole inner thing, that is definite the cue. What I have been doing years, and I have been doing this over two decades, is never intentional. You have already realized the Client is not just lazy, it is not the same kind of procrastination you would normally think of as procrastination. They continue to say they want to work with you, they want to

work do this together, and they still want to be on-point with what they want to target. But, like you said, there is no progress towards it.

So, I began to realize that delays, distractions, avoidances were not the usual type of procrastination. There was something else under there.

I finally realized, and I tested this actually – I did a pilot program with 12 colleagues and friends, including a few formal Clients I collected. I didn't charge, it was just to check out this theory I had. I began to think there was a certain kind of – what we call procrastination – but was really what I came to think of as 'disguised brilliance.' This person is not going forward because something is missing that is key to them in their ability to do the task, or to reach. It's as if they know if they did reach the goal, they would not know what to do with it then. There was something wrong, so one of the precursors to this and where Listening for the Big Five came from is actually this listening for the **big eight** preceded it. I will tell you about that today.

Either something is off with their agenda, and it is not really theirs to do, or it is something people keep telling them they should do, or the industry keeps telling them it is something they should do.

Maybe they keep being told they ought to have a blog or podcast, but they are not really a person to be kind of naturally talented to do that; maybe they are not really quick on their feet for unexpected things. Maybe they like things being scripted.

You and I discovered with this: it is not going to happen on a regular basis. If you have two people interacting on a regular basis, on-line or on the phone, with a live audience, you can't just pre-predict all the stuff that is going to come up. There may be something wrong with the agenda, or maybe the timing is off for them. It is just a thing they are not quite ready to do for some reason.

Some of the reasons they are not quite ready might be called **spaciousness**, they don't really truly they have the time to do more than talk to you, and to plan, and to look ahead; but they don't have the time to execute once it comes to fruition, the website is up, so to speak, the podcast is all laid out and designed, their outline is created, but there is something missing with the spaciousness in

their life. They don't have enough white space. They are fully booked, they aren't prepared for emergencies; there is something going on there.

Some time you have found and I have, too, they don't have the depth of focus they need to have. They may have a very significant case of shiny object syndrome. Other things get their attention, they don't ever get really prepared. They show up anyway, they don't want to be a no-show. They are not bringing with them what they need to bring with them that we need to work with. Some times it is mindset or attitude, at one point, and I discovered this by accident, I had a Client at one point that just didn't think it was her job to be extremely prepared for things. She ought to be able to just stand up and ad-lib at any point in time.

That was not working sufficiently for the kind of prep she needed to do for what we were trying to accomplish.

That might be fine for a stand-up comic with a stage and audience whose audience is very forgiving. But, People had expectations of her that she needed to meet when she showed up.

I knew that, and my job was to help her prepare content and be prepared to deliver that and work with her personal presence and that type of thing. She would not take responsibility for the right kind of bringing her to the work ethic that would be required for that. That was a mind-set attitude issue.

Occasionally skillsets or capabilities are missing. You will probably be the first to realize that, and one of the reasons that person may be dancing around and coming unprepared is maybe they don't know how to actually prepare. So, the most graceful thing we can do for them is once they and we have fully identified honestly what the issues are, and there are a couple of others could be, possibly they don't have the practices in-place day to day to help them make the time and work this in or the habit of the 21 day thing.

You say you have already tried this and it failed. Well, you can't get them to really focus on anything for 21 days, which is very necessary if they are going to begin to master anything.

We already referenced the energy issue. That will come up throughout, there but those are eight different things, agenda, timing, spaciousness, focus, mindset,

attitude, then it goes to skills and capabilities, then seventh being habits, practices and patterns, or eighth in this case can be energy.

Once you begin to get a real hunch that one to two of those things are obviously what are missing, almost always the response you get from the person is gratitude and appreciation. They know something is wrong, too, but they have not known what.

If you can hone it down to what you think it almost has to be in terms of one or two of these elements, and give them a graceful exit opportunity, it could be a leave of absence with you, they'll gratefully take it.

Examples: A direct referral to a source that could help them; maybe helping them manage their calendar; possibly it is medical and they need to get a check-up of some kind; might be some kind of natural alternative medicine would work for them. I had someone who had some anxiety that was under-riding, who did not know how to manage that. I referred her to start a meditation practice with someone else I knew well.

Sometimes they simply need someone to help them organize at their end, and that is not you.

So at the point, we can have that conversation with them, but with specifics we can help point them toward, and we come to that conversation prepared to make a couple of informed referrals.

If the whole situation is kind of a mess, and none of that works, then you may default into this might be a life-long pattern, and this is one of the first things I try to take pulse for and find out about before I am actually formally engaged.

There are some precursor conversations if once we start running into anything like this with more than two Clients. This is not common, it does happen regularly, but is not common in the business when you are taking steps to make sure people are prepared to work with you, then you educate them in how to make best use of you and your services. If you still run into this, you may be running into a therapy issue at their end.

JN: Wow, you know I really like that you have to check your own gut, then you need to help identify what that is. I think it is great you are helping them get what

they need in order to move things forward. If we are just focused in on our projects, which in my case I was, I am not a business coach, so I don't have the training or the insight to say, "Hey, you might want to try this. They are here for meditation." You are right, I was banging my head against this wall saying, why are we still here in this one spot for like a month when it was a simple thing. Just do this once piece to move onto the next level.

I just did not understand it, so I just thought, this is not a good fit for me. What they need from me to get over that one little spot, no matter how many ways I tried to explain it, or use different tools, different times, all the things I knew that worked with other projects just didn't work. So I just bowed out.

Can you talk a bit about that conversation, let's say there are other people out there who are not Business Coaches and don't have that training. Someone who just is in business and is developing projects. Can you go into detail on how to have that conversation and make people feel and accept it, be positive about it, there is no negative feelings towards deciding to not move forward together?

SL: First, you don't want to have that conversation 'til you have completely removed judgment and point of view and opinion assumption from your own mind. It will show up in the conversation and you will show up kind of blaming, or at least not taking 100% responsibility for the fact that it is not working. If it is not working for you, then you can almost assuredly know it is not working for them either.

The first thing I have to do is have listened well enough and long enough to be positive that it is not mine to do it for them, like you referenced and acknowledged. I am 100% responsible for this. I really wish I had been onto this sooner, but we have been working long enough now. Depending on the nature of the relationship, how long it has been going on, what the costs of everything has been for them, I want to take some responsibility for it not working. I don't just want to get them out the door, onto something else quickly. I want to spend some time on this.

The first thing I do is let them know what I think is the issue between these eight elements here. I may even share this with them in advance and ask them if we can talk about that and see if one or two of these may be the culprit for them

rather than them personally. Almost always they are interested in that; that's an almost always without exception.

This is not the first rodeo for them. They have not just begun to experience this with us. It will almost show up as a pattern for them for a reason. It may turn out the main reason they have not been able to get other things started but not completed. With me taking 100% responsibility, and using a Session I don't charge for to try and come to agreement about what the next good step would be. Almost always they are relieved and grateful.

I have rarely had anyone want to continue in the same way once we have had this conversation. So, it is a relief to both of us.

I can go into more detail in a recap next time for Thanksgiving Day to give everyone a chance to catch up as well. Then if you would like, the exact specific steps of this conversation, I can do that in our session after Thanksgiving. For now, the main thing is organizing a truth-telling opportunity for them. If you are going to offer some form of a partial-refund for your end of the delay in getting to this point, do know ahead of time what that is going to be.

In my case, I only needed to do that one time, it was a partial-refund, because we got some things accomplished, and we had identified what the main culprit was, and I was able to make a good referral, and was able to write a partial-refund check.

I have never had repercussions from that. I have had referrals from that person, and in my case, the referral for her worked. It was timing, in her case it was timing, spaciousness, and she went for a medical exam, and it did turn out to be an ADD situation. She did get on some meds and some therapy and it was a combo of organizing herself and getting a system put together, even more than therapy. She went to an ADHD specialist to get the system figured out. So, that is how it worked out.

Courageous Conversations are something we have to have all the time. I do myself; you and your Client get in the middle of something, and there is a need for a pivot. We can continue with them, but we have to continue on a kind of different track.

JN: I think it makes complete sense. If you have been listening to this show for any amount of time, you know at the very beginning Sherry laid the framework for getting involved with someone, and how to do this as a collaboration and not where it is one-sided. That you are in partnership with them, and you really are, then the exit should also be in that same kind of partnership. Sending that information to them in advance. Prepping them we will have this conversation, really kind of lends itself to being something where you can conclude that relationship in a positive, beneficial way for both of you. It really ties into everything. Go into the project together, leave out of the project together.

SL: That is right, the one instance where I made the referral for the person to get into a system, I actually had a particular therapist in-mind, and so we had no breach of confidentiality. We still had an open bridge. I actually asked both of them privately, no names shared but a bit of the circumstance, if I could introduce them together by phone. That therapist- person was willing to give them a no-charge session to come in, and they happened to be local and they had that chance together to come in and see if it was a good match. It was not about an emotional past, as much as it was this person needed help with structuring, and they needed to get across a great many of elements in their life it just showed in the project we were working on together.

That gave the therapist to call me back if or when they needed or wanted to, it gave the Client, with me still in the wings, to know I had their back-side kind of covered. They did not need to come back to me. They did not need to call me back, but that gave all the professionals involved, including the Client some kind of a graceful exit, a transposition place, hand-off so to speak, and there was no shame, no blame.

JN: That is exactly the way we should part ways, the best-case scenario in any situation. Sherry, I know we are doing our recap episode, and folks you are probably this topic went on a little long, there is a reason why. This is a **need**. This is the nuts and bolts, the core of how to run your business. We purposely extended it a little long. We needed to have this space to grow, breathe, come to fruition.

This topic right here has been one of our most popular series right here. Getting a lot more listens, a lot more interactions, so it obviously is something people are

Client Graduation - Early

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mindful and are in need of more training, knowledge, and awareness on. It has been fantastic, but tomorrow we will have our recap show for this segment. This Friday – we will be diving into Week Four on Friday?

SL: Yes, it will be starting Week Four we have been doing this and I am looking forward to that.

JN: It has been quite a ride. Join us tomorrow, stay tuned for the recap show, and of course if you are here in the U.S. have a happy Thanksgiving.

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