PracticeUP!

Quick Reference Guide

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Follow Up to:

Carrying On the Conversation ~ Converting Callers to Clients

Prepare ahead of time:

- Client Initial Interview format
- An assessment format (reporting)
- A contract and electronic signature system.
- Pricing
- Payment system (electronic).
- Script: client interview questions
- Script: responding to objections
- The right attitude! (Confidence)

During phone calls with potential clients:

Don't:

- Talk about yourself.
- Talk about previous clients.
- Try to answer their questions or solve their problems.
- Quote an estimate or hourly rate.

Do:

- LISTEN, LISTEN, LISTEN, then...
- Take command of the call.
- Provide peace-of-mind. Be empathetic and reassuring.
- Keep the call short. Ask your predetermined questions.
- Explain to them how you work (your assessment and estimate).
- Respond to objections.
- Ask for the business (Call-to-Action).
- Send them access to your electronic contract and an invoice.

Call format:

1. Listen. Let them vent for only a few minutes.
2. Ask your questions (Client Intake)
3. Tell them, "This is how I work." Then explain your assessment and pricing process.
4. Ask for the business. "Are you ready to get started?" Then send link to contract, and an invoice.