



Your First Call with a Potential Client

Linda Henslee

LINDA HENSLEE ENTERPRISES www.vatotheresq.com

Your First Call with a Potential Client



How to Have an Effective First Call with a Potential Client

Having that first call with a potential client can often be quite nerve wracking for virtual assistants. But if you have a system in place for yourself and come into it prepared, it doesn't have to be so scary.

This article will give you my best tips on a proven process for successful potential client calls.

Contact page

First, make sure you have a contact page on your website.

On this page, you can either include your email address and ask them to email you with what they're looking help on or, my personal preference, add a contact form directly to your website that includes a link to your schedule so that they can schedule a call with you.

My advice to you here is to make the process as simple as possible. Make it as little steps as you can. The more work they must do (or the more complicated it is), the less likely they will be to follow through with the process.

The contact form

Create a contact form directly on your contact page. You can use Google Forms to create one or use a plugin on your website.

Suggestions of things to include on your form:

Full name

Company name

Email address

Website

Phone number (and/or Skype ID—however you'll be contacting them)

How did you hear about (name of your business here)?

What are you struggling with most right now that you'd like help with in your business?

Let's talk about those last two pieces of the form for a minute.

How did you hear about us?

Asking how someone heard about you and your services is something that most people don't do. But I really encourage you to add this line. It only takes the person a minute to fill it in, and it will give you insight into your marketing and what's working best for you.

I thought I had a good idea of where new leads were coming from, but once I added this line to my form, I was surprised to find another place they were coming from as well!

What are you struggling with?

And, of course, the last line in your form where you ask them what you're struggling with will be where they fill out why they want a call with you. Make sure you use the option in the form to allow for a paragraph here so that they can write as much as they want. This is the info that will really give you some insight as to why they're scheduling a call with you.

Call scheduling tools

This is where you can add in a link to your calendar so that they can schedule with you right away.

You can add a line like, "Thanks for reaching out! Click here to schedule a call with me now: (link to your calendar here)."

I also add that line directly to the web page, just under the form, in case they miss it when they submit their form. This way, I've mentioned it twice and they can see it easily.

How to schedule the call

There are a lot of different programs and platforms out there that you can use to schedule calls. I've tried several different ones; I use Acuity for mine.

You can go in and set up your available dates and have it synced to your calendar (I have it synced to my Google Calendar) so that you never miss an appointment. There is a free version and a paid version, so I suggest that you check it out and give it a try. It's quite user friendly.

But, like I said, there are a lot of scheduling tools out there, so find what works for you.

The actual call

Now we're getting to the good stuff! What do you say on the call? This is the part where a lot of virtual assistants get stuck.

I'm going to give you some suggestions here. At first, you may want to write up a little script for yourself and keep it printed out so that you can refer to it while on the call. The more calls you have, the more your confidence will increase—and the less you'll need that script!

Look, I know this whole concept of talking to a total stranger on the phone and trying to “sell” yourself is quite daunting. But I want you to look at this a different way.

They took the time to fill out the form and schedule the call. So, they WANT to talk to you. And you're not selling yourself. You are sharing your awesome gifts with them and showing them how working with you will benefit their business. You are HELPING them!

First things first—remember during the call that YOU are in charge. You should take the lead right away. This will show them that you're confident and capable, and that you take your work seriously.

Start out by letting them know what to expect on the call. Thank them for scheduling with you. Tell them you'd love to hear, in their own words, more about their business and what they're struggling with, and then you'd like to share how you help your clients. Ask if that sounds good to them.

Asking them to respond and confirm ensures that you are both on the same page and that there won't be any surprises during the call.

As they tell you about their business and needs, take notes if you need to so that you don't forget any key points. I use a cool little app to record my meetings because I'm not so good at taking notes and this is just easier for me.

Once they're finished explaining things to you, repeat back a synopsis of what they said. Then ask if they agree with the summary that you gave. Again, this will help to ensure that you're both on the same page. Communication is a big key to working with clients, and you're establishing those lines of communication right up front.

Next is your chance to explain how you're qualified to help them with their pain points. You can mention that you've worked with clients like them before. Feel free to give an example of a similar client situation and the outcome they had from working with you.

This is your chance to talk about the BENEFITS of working with you. If they sign up for your services, will they experience more time freedom, save money, make more money in their business?

Wrapping up the call

Then let them know the next steps. The next step will really depend on what was discussed during the call. If you feel that they're a great fit for what you do, let them know what package/service option you offer that would be the best for them. Then tell them you'd love to work with them, and if they agree, discuss starting that process. (It's a good idea to have your prices/packages in front of you on the call if you're just starting out and don't know those things off the top of your head.)

For example, your process may be to have them sign a contract and pay an invoice to get started. It may be to schedule another call to evaluate what you'll be helping them with and the scope of the work so that you can offer an estimate.

If they seem interested but not ready to work with you at this time, you could ask if you have their permission to add them to your mailing list. Then you can keep in touch with them and stay top of mind so that maybe you can work together in the future.

If what they struggle with in their business is completely out of your zone of genius, you can politely let them know that it's not your specialty, but maybe you can refer them to another awesome VA who does that kind of work.

And there you have it! This was your rundown on how to have an effective call with a potential client. I'd love to hear your thoughts. Have you had any potential client calls yet? Did I miss anything? Tell us about your experience!

Affiliate Disclosure

This ebook may contain affiliate links. If you click on one of my affiliate links and make a purchase, I may receive a commission for referring you. This comes at no additional cost to you. Please know that I only recommend resources I like and highly recommend.

Copyright Notice

All material in this document is, unless otherwise stated, the property of Linda Henslee, Linda Henslee Enterprises. Copyright and other intellectual property laws protect these materials. Reproduction or retransmission of the materials, in whole or in part, in any manner, without the prior written consent of the copyright holder, is a violation of copyright law.

It is unlawful to forward, transfer, distribute, reprint for public consumption or resell this document in any manner whatsoever and may not be included in any sale of a business. Unlawful use or distribution violates U.S. and International Copyright Law and the seller's exclusive rights to sell and distribute this form. The full extent of all legal remedies will be pursued against violators. Seller reserves the right to pursue unauthorized users of this instrument.

Nothing in this Agreement shall limit the rights of Seller to initiate an action against you in any jurisdiction where such jurisdiction may be properly exercised. License does not grant right for use in any educational or training program. Contact information for requests for permission to reproduce or distribute materials are listed below:

Linda Henslee Enterprises

linda@lindahenslee.com