Client Intake Cheat Sheet

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Contents

With the Client Intake Cheat Sheet, you'll have a step-by-step process to follow to implement a Client Intake Process for your business.

Included with this download, you'll find:

- **Client Intake Cheat Sheet** — Describing (step-by-step) how to get started and set up a client intake system.
- **Recommended Tools** — The exact tools that you'll use in your client intake system, all in one easily referenceable place.
- **Proven Email and Phone Scripts** — Email and phone scripts that you can copy, paste, and start using to manage your communication with prospects during client intake. These *6 proven scripts* are ones that I personally use in my business.

- **Client Intake Cheat Sheet Article** — A copy of the full *"Client Intake Cheat Sheet"* article for your reference.

To re-download any of these resources, just visit ClientIntakeCheatSheet.com, click 'Get My Client Intake Cheat Sheet!' and enter your email address to receive a new copy of all of these files.

Your Client Intake System

When you break it down, your client intake system breaks down to look like this:

- When a prospect comes to your website they fill out a short intake form or application
- When they fill out the form, they're automatically emailed follow-up questions from you

- When they respond, you can review their answers and, if they qualify, send then a templates email to schedule a meeting
- When you meet, you can ask them a pre-determined series of questions to identify if and how you can help their business
- If you can, you send them a template that explains the next steps to take. If you can't, you send them a template suggesting other options.

That's it. That's how it breaks down. Let's step through implementing this in your business.

Getting Started

To get started with a client intake system, I recommend we follow a slow, iterative process.

We don’t want to throw *all of the things* at your business at once. That would be overwhelming.

Instead, we’re going to follow a slow, incremental process to implement a Client Intake System for your business.

- Start with the Prospecting Script
- Add a Booking Tool
- Add an Application Form
- Start using an Email Template Manager
- Add a Notification Email with Follow-Up Qualifying Questions to the Application Form
- Add Paid Calls to your service offerings

You can tackle this at whatever speed you’d like. You can implement a new piece for your business over 6 weeks — or 6 days.

Let's step through each piece so you can see how to implement it for *your* business:

Prospecting Script

The first thing we want to add? We want to add a 'Prospecting Script' to our business.

A prospecting script is a short email with qualifying questions for the prospect to answer.

By using a template or script, you're able to ensure that you're asking each prospect the *same* questions.

By asking prospects intake questions before you get on the phone with them, you can use their answers to qualify or disqualify them.

Here's the prospecting script that I recommend using:

Heya {First Name},

Nice to meet you! :)

Thanks for applying for my {Product Name}. I'm excited to learn more about your business and see if I can help you grow! I'm selective about who I work with because I only want to take on clients who I think I'll be able to help.

To get started, anything you can tell me about your business in advance via email would be helpful. (Once I hear back from you, the next step will be for us to schedule a call).

Here are a few questions to get you started:

› How long have you been in business?

› What types of customers do you typically serve?

› What sorts of things do you do for your customers?

› What's the origin story behind the company?

› What are the main challenges you're facing these days?

> - How would you measure the success of a project together *(i.e., what would a homerun look like)?*
>
> Feel free to braindump anything else that comes to mind. It'll help us get productive more quickly on our call.
>
> I'm looking forward to your answers!
>
> Thanks,
>
> {Your Name}

Copy that script and start using it. Next time a prospect emails you, reply with that script and see how they answer.

- **Do they reply with long, thought-out answers to your questions**? Wonderful! They're a great prospect.
- **Do they reply with shot, one- or two-sentence responses**? Hm, they might be that great of a fit.
- **Do they not reply at all?** Great, they were a tire-kicker. Move on.

Booking Tool

Why use a calendar booking tool? Three reasons:

1. It lets the prospect easily pick the best time

When you send someone a link to your calendar booking tool, you're giving them the ability to pick the best time that works for them. They can review your available times and pick a meeting time that works for both of you.

2. It saves you time

How many times have you done the song-and-dance with a prospect about when to meet? The 'Here are some times, let me know if any work' shuffle?

By using a calendar booking tool, you avoid needing to send meeting times back and forth with a prospect, playing 'battleship' with your calendars. Instead, you're able to say "Here, my friend, look at my calendar and pick the time that works best for you."

3. It makes you look like a professional

Tools like Calendly make it easy for you to define the exact times that you're available to meet with people. For my meetings, I have the hours of 1pm - 5pm PST, Wednesday and Thursday, available.

People are able to pick from a limited amount of available times. This has the dual benefits of making me look like a busy professional (I only have a few meeting times available. You better pick soon or else risk missing out) and protecting my time (I'm clustering all of my meetings together, preserving the rest of my week to focus on work.

While I swear by Calendly for booking meeting times, friends, colleagues, and clients use ScheduleOnce and other tools. If there's one you already like and use, keep using it. Otherwise, I highly recommend Calendly.

Here's the 'Schedule a Call' email I send back to qualified prospects:

> Heya {First Name}
>
> Nice to meet you! I'm honored that you'd like to bring my brain into the mix. :)
>
> I'd be delighted to talk this week or next week. Please use the link below to select any available slot in my calendar. We may not need the full 45-minutes, but let's start there just in case:
>
> {Link to Calendar Booking Tool}
>
> I'm looking forward to our call next week!
>
> Thanks,
>
> {Your Name}

Application Form

Once you've defined the questions you want to ask an incoming prospect and set up a way for people to easily book meetings with you, then you're ready to add an Application Form to your processes.

Your Application Form is where a prospect enters their initial information about themselves and their business and begins the process of qualifying themselves as a client.

I like using a form with minimal fields. This puts the *least* amount of friction up front — because once they apply, you'll send them your Prospecting Script from above with the *real* questions for them.

On my application form I ask the minimum amount of information to get started:

- Their first name
- Their email address

For implementing an Application Form, I recommend Gravity Forms if you're on WordPress or Wufoo if you aren't.

Template Manager

Once you have an application form, a calendar booking tool, and a prospecting script in place, the next thing you'll need is an Email Template Manager.

Your Email Template Manager is a place where you store the different email templates and scripts that you use within your business. *(For additional email templates and scripts, see the included 'Client Intake Cheat Sheet - Email Scripts' document)*.

I recommend Yesware as my Email Template Manager of choice.

Notification Email for Application Form

Now that you've got your application form set up and have a collection of your email templates stored for use with prospects who email you, the *final* step is automating that Prospecting Script from above.

After all, if we're sending that template to every prospect that contacts us, why *actually* send them that template?

Instead, you can use your Application Form *(Gravity Forms, Wufoo, or Something Else)* to automatically send your prospect your Prospecting Script.

What I recommend doing is configuring your Application Form to send a *notification email* to the person applying to work with you.

Set the notification email that's sent to them to be the prospecting script from above. Set the `reply to` address to be your email address.

This way, whenever someone applies, they're automatically sent your qualifying questions. If they reply back, you're able to make a decision of if the *prospect* is qualified to work with *you*.

Paid Calls

Finally, you should implement a system to *charge for phone calls* in your business.

Why charge for paid calls?

Sometimes a prospect will contact you and respond to your initial email and be a less-than-ideal fit for you and your business.

In those cases, I recommend using a service to charge for a paid consulting call with these prospects.

Why should you charge for a paid call? There are a few reasons:

1. As a professional, your time is worth money.

If someone wants to speak with you, pick your brain, and gain access to your insight and expertise, they're receiving value from you. If they're receiving value, it makes sense for you to be compensated. Therefore, when you provide value to someone, you should charge for the call.

2. If this is a prospect that doesn't meet your criteria (wrong industry, wrong goals, wrong attitude, etc), then they'd be someone you'd otherwise reject.

By instead offering them the opportunity to schedule a paid call with you, you're providing a solution to their need: access to your insight and expertise. What's the alternative? Telling the client that you can't help them. By offering them the option to pay you for your knowledge, you're providing a win-win solution to what otherwise would have been a poor opportunity.

Is it necessary that you charge for your prospecting calls? Absolutely not. What I'm recommending is that is a prospect applies to work with you and they don't seem to be a good fit, instead of rejecting them outright, you offer them the option to consult with you over a paid call.

For prospects that are good fits for working with you, I don't recommend going for a paid call. You need to build a relationship, understand the issue struggling to solve, and see if you can help them before you can recommend a paid service.

For prospects that aren't perfect fits for working with you or that you'd otherwise pass on working with, you can now offer them the opportunity to purchase a paid call from you.

While *you* might not see the value in the prospect working with you, the *prospect* might assign a very high value to speaking to you. So offer them a choice of paying for a call to gain access to your insight and expertise.

You can use a service like Clarity to charge for paid calls. Alternatively, you can use Gravity Forms or Moon Clerk) coupled with Stripe to accept payment for a call.

Initial Prospecting Call

Once the prospect books a time on your calendar, you're confirmed for your initial prospecting call.

I like using a script for these calls, walking through seven questions that I have about the prospect, their business, and their goals to determine if I can help them.

Here's a copy of the questions — the exact script — that I use on these initial prospecting calls to learn more about the client's business.

Opening the call

> "OK, so we have 30 minutes and I have another call straight after you so we'll need to keep to time, is that OK?"
>
> [-yes]
>
> "Thanks for that. So my job today is really simple. I'm going to ask you a bunch of questions, to work out IF or

> HOW I can help you. If I feel like I can't help you, I'll let you know politely, and do my best to point you in the right direction. If I feel like I can help you, we'll book in another time to talk about how - is that OK?"** >
>
> [-yes] **> "Perfect, let's get started."** >

Questions to ask during the call

> 1. Tell me about your business. How does your business make money?
> 2. How can I help?
> 3. Why start now versus six months from now or six months ago?
> 4. Why choose me? Why do you think I'm the person to call?
> 5. What's holding you back from getting the results you want?
> 6. What specifically is broken, missing, or not working?
> 7. You've mentioned a few issues - which has the greatest impact in the short term?

> 8. Let's say I approve you as a client today. Can you walk me through the process of you deciding to work with me?
> 9. What questions do you have for me?

Summarizing the call

> "It sounds like your top three problems are: 1. You want `$result` but `$obstacle` 2. You have `$problem` and it's costing you `$impact`, and 3. You don't have `$desired\_thing` and it's hurting you because `$cause`."

Conclusion: qualifying your client

> Bad fit: "At the start of our call I said I'd ask you a bunch of questions to work out if or how I could help you. Based on what you said, I don't think I'm the right guy for you. But I do want to support you in a different way. You should talk to..."

> Good fit: “It sounds like we’re a good fit.”The next step for us is to book another time to talk about how I can help you reach your goals.”

(You can find email scripts to use in the case of a bad fit or good fit in the included ‘Client Intake Cheat Sheet - Email Scripts’)

Building The System

Once you’ve set up this entire system, what does it look like?

1. First, a prospect shows up on your website and is present with an application form to fill out to work with you
2. Then, the prospect receives your Prospecting Script, asking them follow up questions about their business so you can understand how you can help them.

3. After that, if the prospect is qualified, you can respond back to schedule a call (using your Booking Tool). If the prospect isn't qualified, you can respond back with a script letting them know you're available for a limited number of paid calls each month.
4. Next, during your initial call with the prospect, you have your prospecting questions ready, ensuring that you're asking the *right* questions about their business.
5. Finally, once you've had a conversation with your prospect, you can reply to them using one of your email templates, either referring them to another provider (if they're a bad fit) or proposing the best options for working together (if they're a good fit).

Next Steps

Want to continue improving your consulting business? Here are two ways you can get started:

- **The Independent Consulting Manual** — A book I edited and contributed to on building and running a stable, durable consulting business. With over 500 sales in the first 2-months *(and a refund rate under 1%)*, the Independent Consulting will help you grow your consulting business. Read more about the Independent Consulting Manual here.
- **Business Coaching for Marketing Consultants** — Are you looking for actionable and specific direction, advice, and accountability on growing your consulting business? I work with a select number of consultants to help them grow their business. Read more about Business Coaching.