

Sink Handle Episode 18 for Transcript

Hello everyone, and welcome to Episode 18. Getting clients is so exciting! You got the clients, you've made the sale, you're doing all the stuff, right? You've had the social media, you've had the blog, whatever it is, you now have clients coming to you. And now that's scary because you don't know what to do with them. Or maybe you have clients coming to you. You have brought them in and worked with them for a while, but it seems like a messy process, right? Everything's always back and forth, and you don't know what's going on and it just seems a little messy. So I thought today I would share with you the basics of my client onboarding process. There are books written about every step of this like you can get as detailed and granular as possible. I want to give you a brief overview of thing of the different things that I do to make sure that we're set up and ready to go as soon as the client is coming in. So the first thing is, most the time, you're going to have some kind of discovery call or some kind of meeting, where you're going to check and see if their suitability. So, on my website, you can go and book a 15 minute call. You tell me what you need, I tell you how we work, that kind of thing. And we see if we are a match. I've had calls lately that within the first four minutes, I realized this is not gonna work. We're very different people, we want different things. Or that person that is coming to me doesn't even know what they want, or they don't need me. They need a virtual assistant maybe or something like that. You can weed out a lot of that kind of thing in that 15 minutes. It seems like nothing but if you're very efficient, you can find a lot out and it will save you a lot of aggravation, working with people that you are obviously not a good fit for. So after that call, I usually send some kind of proposal not a formal proposal, but an email kind of recapping what it is that we were talking about what my services are, what my fees are, that kind of thing. What I recommend them doing if it's a retainer package, or they want to do just systems package, like it's a package of things that I'm going to take care of, or if it's ongoing work, maybe it's a strategic mapping session. So all of those things, I'm going to put that just as a brief email, this is what we have talked about, this is the pricing, you think about it. And then they will come back to me and say, Well, of course, you're awesome, Kelly, I would love to hire you. And then the next steps would be setting up a contract and invoice so you're gonna want to send the contract out to the clients, just as a basic agreement, right? What we expect. How we work. Are things refundable? When is the date of delivery? Different things, all of our businesses are different. So that's going to be different than mine. Probably. Right? So you're going to send the contract out. I use Hellosign it's free for the first three things you sign out. It is legally binding to send as an electronic copy so you upload it or you can do this straight from Google Drive, which is the best thing ever, if you have a drive copy of your contract can kind of update whatever you need to do. There's a Google add on for Hellosign and DocuSign. When you're in the file, you are going to just drag and drop like the little boxes where you want them to sign in date and any other information you need. Like mine requires them to put an address in for legal... if I ever had to do anything legally, like serve them papers, I guess or I don't know exactly, but that's what it says. So I do it, then you send that over, they can sign electronically. Then download that when you get it back. And then an invoice. You're gonna want them to pay you. I have everything prepaid. All of my services are prepaid at least, if it's monthly service, they get paid the first of the month. It is a package service. Sometimes it's monthly if it's over a couple months, or if it's a package, maybe it's 50% and then 50% delivery, something like that, but there's

always a prepayment of some kind. I will send the invoice out. I work through QuickBooks, I'll put all this stuff in the show notes because it'll be easier for you. I work through QuickBooks, I send the invoice and I send it out directly from there, there's a pay button on there people can pay by credit card or ACH. So I'm sending them something from Hellosign something from QuickBooks. They can then sign the contract and pay everything right from their computer or frankly from their phone if they really wanted to. And then I also send them a W-9, my W-9. So this is a one of the basics of working with subcontractors either if you are the subcontractor or the... independent contractors, I'm sorry, If you are the independent contractor or they are the independent contractor if it was a team member being on boarded a W-9 is basically just a way for you to send them an official document an official form with the information they need to claim you as an expense on their taxes. So it's name of the business or person address, social security number or tax. Id And what kind of business you are, are you an LLC, a sole proprietor partnership, that kind of thing. And they're going to take that at the end of the year and create a 1099 which is if you were in corporate, you had a W-2 that you would do your taxes from it had all your wages on it. But when you are not on payroll, you don't have that what you get as a 1099, which says an amount and official amount of how much you've been paid over the time, as a business, you need to create that 1099 at the end of the year for taxes in order to apply that as an expense on your business. So that's a long winded explanation of to what a W-9 is. W-9s are also only for U.S. people. If you are outside the U.S. it would be a W-8(ben) "Ben", that says that they are not subject to U.S. taxes. These are just ways of the government kind of saying okay, who's doing what? What kind of business do you have? What kind of taxes are you paying? So now we've sent the contract and they've signed it. I've sent the invoice they've paid it and they have my W-9 for their own taxes later. My first step on any kind of retainer, ongoing Director of Operations. OBM work, then is a strategic mapping session. If this is just a package that I'm going to do for systems or something like that, I won't do it. You can also have a strategic mapping session all in its own. What that is, is a session, it's two calls. And it creates a plan of where we're going and what we're doing. We work on mission-vision-values, we break down all the strategic objectives, what's most important to you and your business for the next quarter. And then ranking those kind of things, pulling projects out and then deciding exactly what we're going to work on for the next quarter. Extremely helpful and knowing where you're going. So all of my clients that I'm starting to work with, I always do a strategic mapping first. That way I know the lay of the land, I know what's going on. I have a much better view of the business. So when I start working with them every day, I know where all the stuff is, I know what's going on to know what's most about important, is it financials? Or is it team building? Is it product development, like all of those things? What is the most important, that's what we're talking after that if they have elected to not to do shoes mapping, but continue with every day ongoing services, I'm going to send them a welcome email, which will have lots of little information in it. So in the beginning, when I sent out the proposal, I also sent out a 'Work With Us' sheet. I've talked about this before a little bit, but I will send it again in the welcome email because you know, most people only read half their email. Always over communicate. That's my advice to you is when we're talking about the Work With Us document, okay, so that basically means it's like a welcome kit I call the welcome kit. It tells you what our hours are, what kind of communication we'd like to do. When should you expect a response to that email? Do you expect it in the next 10 minutes? Or do I have 24 hours to respond to what kind of holiday schedule when How does vacation get handled? How much notice am I getting give you if I'm going to go on vacation things like that. How do we bill how we pay? Is there a rush fee? Is there a late fee? What is the timing on things? What are deadlines? What status reports? Are we going to hand out that kind of thing? Also, I like to include

things like security, what kind of security do I use, I use a VPN. I use LastPass for all of our passwords. I have Webroot for antivirus, like little things like that. Just adding them in and telling people where you are and how you work. It's really important. What kind of tools we use, I use teamwork. I'm a huge, huge fan of teamwork, PM (project management) and what we use for signing contracts like Hellosign or things like that. I have a section there as well on ethics, how I run my business, and I want them to know right away how I work. And then also what happens when this thing is over. Right? I want everyone to be happy while they're here and happy after they leave. How do we break up amicably? Not badly, but like, you know, sometimes things just run their course and they're going to go on to do something else, how is that going to be handled? So they can say, Okay, we have five days to download this, or we have this much time to do that, or whatever the things. So having all of that kind of set out, people, even if they've read it in the beginning, and they kind of forget half of it, they understand that there are rules, and what's going to happen, and they can always refer back to it. But they also just know, like, a lot of this is just letting them know I'm on top of it. Like that's my gig, right? I'm on top of it. So showing them when they come to me that I have a lovely sheet with it's all nicely formatted. Everything's set up and they're all ready and I have a system. That's what they want to see. Especially when you know, to be clear, I'm not cheap. I've been doing this a long time. So when you come to me and I look like I scratched some stuff in the back of a napkin like I don't look legit. So I try my best to look legit. So I have a welcome kit, I have contracts, everything's branded, my invoices, all of that. So all goes out, everything's as easy as possible. So then in that welcome email, I'm going to say hi, welcome. So happy you're here. Here's my work with me. Welcome kit documents. And then any other thing like I share what my LastPass email is. So if they want to set start sending me passwords through there, it's an encrypted service where you can share your passwords safely. My let them know that I let them know what the next steps are, and then set up a kickoff call. So you can either do that through a scheduling link, like here's my Acuity scheduling, to set this call up. Do you want to get a kickoff call? I know you've already done this shooting mapping. But now we're like okay, nitty gritty. What do we have to set up who I have to talk to that kind of thing. The strategic mapping is like a plan for the business. And then the kickoff call is more Alright, Tuesday we're going to do this. Thursday I'm going to talk to that team member. What is the details of everything? When are we gonna have regular calls? Am I gonna have team calls? Am I gonna have client calls? All of that kind of stuff. All of that gets done in the kickoff call. All those details so that I can then go and set up everything on my site. Things I set up: I keep my stuff in Drive, because it's easier with my email. I have G-Suite for my company email, there is a client folder that is set up in Drive. It has their in all their contracts and any legal documents that we have in there. Any kind of invoices that need to be in there any kind of thing like that there's files shared with my team, so they have access to everything. In there will be a client brief. It's just a basic sheet, but it has like name, address, phone number, team member names, how they like to get their invoices sent, how they like to pay, things like that. So that if my team needs to know everything, or if I forget, because seriously, sometimes these things are like, you only need these things once a year, it's good to write them down. So that will be in there. A whole client brief of all the information I need. If I have to go back and find out an email address or something like that, it's in there, then I kind of have work folders for them that I can start putting documents in that I'm working on. Because a lot of times when I get to a client, they're not really organized. So I start organizing in my files, just saying like different documents, different things. We're working on trying to get things organized. And then when I get over and I start to really get into their files, then I can get them organized and just move everything over. That way. From day one, I know where things are. And then

the rest of those setting up things. So we I'm going to file the contracts. I'm going to create the client brief, and then I'm going to set them up in my project management software. I have a template that I that pop in. And it's a task list of all the things I've got to do here, I can start putting things in there when the calls scheduled, put those on my calendar, things like that, getting all the stuff in getting the Lastpass info, like if they're going to set up an email for me with their company, or if they are going to give me passwords to all the things I need to do. I need to get into their whatever, they can get that all over to me in LastPass and then adding them to slack. Either I get added to theirs or they get added to mine. That way we can chat makes it so much easier to just be able to like chat back and forth on slack. It's enormously huge for me, my whole team talks there and I talk with my clients there makes it so much easier at the clients birthday to your calendar. Little things like that matter. Everyone loves when their birthdays remembered. So any other systems get set up that way. And that's the basics. That's the basics of setting it up. So as an overview we've gotten the client On a discovery call, and we figured out if they're possibly right for us, we sent a proposal and a welcome kit work with me kind of sheet. So they know what's going on how much it costs and what's expected. Contracts really important. Everyone should know what's going on. Everyone should know what the deal is, and how this is going to work. Send an invoice because you know, it's nice to get paid for your work, and your W-9, so they're ready next year, January 28. When everyone's scrambling to do their tech stuff, they'll already have your stuff. So then we're going to have a welcome email sharing a LastPass email, or any other work with me the documents, anything that they need to know to get started. And then I do strategic mapping, obviously, but it wasn't whatever that kind of thing is for you. Whatever that plan is where you're sitting down with the client, figuring out what your plan of attack is, what is the plan here? What are we going to do that kind of thing. Then the welcome email, then planning the kickoff call. What are we working on? First? What are the expectations are their metrics that we're going to try to meet. And then the setting up internally, the files that you want to create, so you know where the contract is, you know, if there's ever a dispute, it's nice to know where anything is. being organized is pretty awesome. Keeping a client brief so you have all the information you might need, or your team might need on hand pretty easily, setting them up in any of your systems, getting their information that they you need to get started and get working and, you know, remembering the birthday once in a while. This is a really, really basic run through, we could dive into any one of these bullet points for an hour each. I'm sure. I'm just trying to give you an overview. These episodes are not four hours long. We bring clients in so that they have all the information they need. We have the information we need, and we can just get started. Because going back and forth, it's just draining. You look online and you see something and you're like, Oh my God, that's the greatest and you're so excited about it. For a lot of people, when they buy your services, it's a big deal for them to spend that kind of money to invest in their business in this way, they're so excited about it. And they're really going to do something with their business and they're ready to go. And then they don't hear from you. Or you get kind of half assed paperwork or not everything's there, or you have to go back and forth. And it kind of seems like you don't know what you're doing. If you if you do like if you buy something, you don't get a receipt, you're like that go through, and then you get nervous. And all of a sudden, there's a little buyer's remorse of, oh my god, I just invested all this money, and now I'm scared that I'm not going to get my money's worth. It's a terrible way to start off, when people are excited, and then you give them a really great experience that excitement carries through and then they just love you and it's a lot easier to deal. When everything kind of goes to hell. And you seem like you don't know what's going on. You're not answering back or they have to chase you, that sticks with them and then everything comes out of that

lens, and then everything is like, well, he didn't answer me on that. I don't know if he's gonna do it on this, you know, and he just kept this yucky feeling. And that's not the way you're going to have a great relationship with your client. So starting off on the right foot, having that great first impression and really showing off what you have and who you are, is going to push that relationship into a such a better place. I know that this is very specific to me and all of you have very different businesses out there. But I hope that at least something in here is useful so that you can adapt it to your business so you can go out there and show off to those clients and rock out. Alright guys, I'll see you next week.