GET STARTED AND SUCCEED WITH NEW CLIENTS

INTRODUCTION

Working with clients remotely takes diligence, and consistency. Whether you are doing a project or ongoing tasks the key to success is to get clear on your clients' requirements early on so that you can meet and exceed their expectations.

The more systematic you are in your approach to new client work, the more successful you will be in achieving great results, and in client satisfaction, and retention. Remember that while your work might be amazing, it is your ability to accurately understand your client's expectations, and to communicate with clarity, which will make all the difference in starting right!

ONBOARDING

If at all possible, schedule a meeting with your new client to review the scope of the work, and gain further clarity on expectations. It's also a great time to define your responsibilities for the work, and the position.

Just as you were prepared to get the job - attend this meeting with purpose. The more you understand the expectations for the work the more you'll be able to help, and the more hours you'll log!

And don't forget to take notes of the agreed processes, and actions so that you can confirm your understanding with your client in writing.

Clients have varying levels of organization. Create a systematic process to help your clients gain further clarity on what they need & how they work, and help yourself succeed!

The following are a few ideas and tips for what to cover at a start of a project with a new client.

1. DON'T ASSUME ANYTHING

First, don't hesitate to ask plenty of questions about the job description, the skills required for the position, and where you can find manuals and check lists for the work. Remember that because your client is immersed in their business, many of the tasks and procedures that need to be performed are going to be second nature to them so it's your job to ask the questions, and to dig for information. And if there are no manuals and check-lists, offer to create them!

2. REVIEW PRACTICAL INFORMATION

What systems and procedures are already in place for the work? Request that your new client set aside some time to train you so that you may become familiar with the organization's daily processes.

What is their preferred method of communication? Gain clarity on whether your client prefers to communicate via emails, video chat, a tool like Slack, or something else!

Will you be assigned a company email? Are there logins, and passwords, which you should have access to? What software and tools does your client use? For example do they have a CRM system, or a task management system? How will they delegate work? Be sure to ask if there are any "office" protocols, such as existing methodologies for how to name and arrange files in the cloud.

And at anytime, you may also want to recommend what works best with your other clients, and offer recommendations for better efficiency. Don't forget – you are the expert!

3. INQUIRE ABOUT EXPECTATIONS

Are there tasks that are to be done at set times each day? For example, if you are in different time zones, be sure to establish a clear project outline and coordinate times when you can both be online to discuss progress. And if you are unavailable at certain times of the day, be sure to let your client know so that they don't expect to find you online at those times.

4. UNDERSTAND THE COMPANY CULTURE

If you are going to represent your client to vendors and colleagues enquire about their style of communication such as the tone of the emails. Should you be communicating in a friendly and hip way, or in a more professional and serious tone? How should you sign the emails? What is their preferred greeting for answering the phone?

5. KEEP IN TOUCH

Ask your client how often they would like updates on the work. Do they prefer an acknowledgement on every email, daily status reports on tasks completed or a weekly round up? If you have questions on the work, should you email, text, or contact them another way? Are there times during the day when they should not be disturbed?

You might also want to recommend a weekly check-in to keep the lines of communications open and to gain more clarity about the work. Scheduled meeting times are great to build trust, and keep momentum on the work.

6. LISTEN CAREFULLY

An obvious one but often underrated. It's often not enough to hold a meeting, ask questions, take notes, and get to work.

While it's important to have a process for getting started don't forget to stay present and to actively listen for what your client might be saying. For example, do they appear anxious about security and how files will be shared? Go off script to address any pending concerns. Listen carefully with an open stance!

7. BUILD TRUST

Don't hesitate to offer to sign non-disclosure agreements, explain how you take client confidentiality seriously, and be ready to speak about your home office set up, and how you keep all client files safe in the cloud.

IN SUMMARY

Getting clear from the onset, practicing not assuming anything, active listening, and keeping in touch regularly will build trust and lay the foundation for a long term and successful partnership with your clients.

Remember that your clients are busy, which is why they have reached out to you in the first place! Don't be shy to ask for specific information early on – it will pay off big time in your ability to meet and exceed expectations, and it will create a rewarding experience for both you, and your clients.