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# Before the Call

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|[ ]  1. **Review the Client’s Onboarding Questionnaire**
	* + This will be forwarded to you in an email. In this form, they will have gone over their company’s background, what they want in an assistant, their communication preferences, etc.
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|[ ]  1. **Review Collateral**
	* + Review their website, social media & any other collateral that you can get your hands on.
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|[ ]  1. **Make a List**
	* + Of everything you find over reviewing of their materials such as website, both positive and negative, and remember to position the negatives as opportunities for improvement.
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|[ ]  1. **E-mail a Confirmation**
	* + This will be for the time and date of the call and be sure to include any time zone conversions.
		+ Sample email: I am looking forward to our Orientation Call on [day of week], [date], [time] and [their time zone]. I will call you at [their number.] I’ve blocked off one hour for this call, but we can take as much time as you need. For accuracy’s sake, I’d like your permission to record the call so that I can spend my time focusing on your answers.
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|[ ]  1. **Set Up the Call Recording**
	* + Let the client know that you’ll be recording the call and be sure to receive explicit permission to do so.
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# During the Call

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|[ ]  1. **Introduction (5 minutes)**
	* + Sample script: “*Our conversation today will center around me getting to know you and your business a little bit better and share with you how to best work with me and the team as your Virtual Assistant. Of course, there will be ample time for questions as well. I’ve blocked off one hour for this meeting, but we can take as much or as little time as you need, okay?”*
		+ It’s important to come across as an expert. You need to demonstrate your understanding of the job at hand, take control of the call, and gather the information you need to move the campaign/project forward with the client.
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|[ ]  1. **Client History (5-10 minutes)**
	* + Ask 2-3 qualifying questions about their business. Show that you’ve done your homework.
		+ Sample script after hearing their story: “Great, I am so happy to get you there as your lead Virtual Assistant. Next, I’d like to talk about your goals and first tasks. Finally, we’ll finish up with me sharing about Virtual Assist USA’s policies and procedures.”
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|[ ]  1. **Client Objectives (10-15 minutes)**
	* + Ask for details about their first few tasks. For example, if they mentioned that they need help with email management, discuss how exactly you would be able to achieve this. Get more details, and figure out how they will be sharing logins, etc. If they haven’t mentioned any specific tasks, ask them what they would like you to “take off their plate as soon as possible”
		+ Find areas where you can close the gap
		+ Make sure that the scope of work fits your skill sets. Ideally, this has already been worked out during the matching process. Don’t get yourself into something you can’t deliver on. If it’s outside of your skill set, utilize the Team Talents sheet or contact Danielle to assess different needs/team members.
		+ Build the goals and tasks together—they’re worthless without the client’s buy in
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|[ ]  1. **Orientation, Policies & Expectations (10-15 minutes)**
	* + This part is strictly to reiterate to the client about our policies, procedures, turnaround times and best practices for working together. The client should have a thorough understanding of how to work with Virtual Assist USA.
		+ Politely ask the client if they have any questions regarding our policy guide, including our procedures, turnaround times and best practices for working together.
		+ If yes, kindly answer their questions. If you do not know an answer, inform the client that *“you want to make sure to provide them with the most accurate information and you will find out immediately, and follow up with them directly after the call with an answer”.*
		+ Reiterate the expectations of communication, turnaround times, and most importantly their goals for working together.
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|[ ]  1. **Recap (10 minutes)**
	* + Reiterate what you went over and what your next steps will be. For example, sending them an introduction to another team member to handle a task, starting with research, or getting set up with an email address.
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|[ ]  1. **Schedule Check-In Calls (5 minutes)**
	* + Schedule check-in calls with the client, weekly for the first 3 months. This is imperative to client retention. Schedule them on the same day and time each week. A best practice is to have all of your client meetings on the same day per week, a day that is convenient to you, to prevent interruptions in your work.
		+ Use these calls as an opportunity to strengthen your relationship and as an effective method to reduce churn/turnover rate.
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|[ ]  1. **Ending (2 minutes)**
	* + Sample script: “Thank you for taking the time to meet with me today as I know that your time is valuable. I am looking forward to taking tasks off your plate and giving you back your time. Do you have any other questions?”
		+ Be sure that the client understands how much you value their business
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# After the Call

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|[ ]  1. **Build Your Plan and Send Follow Up**
	* + This critical step involves taking the notes from your Orientation and turning it into quantifiable plan with goals that you (and other members of the team) can execute. The better you clarify this part, the more likely that you and the client will stay aligned throughout and that the client stays retained.
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|[ ]  1. **Upload Recording to Teamwork PM File**
	* + Make sure to include this in the file section of their folder in teamwork.
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