<u>New Client Checklist</u>

Name of Client

Contact Person

Phone

Email

Website

Scope of Business

Do They have a team of people? (If so list here)

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1. **Client's Pain** (just LISTEN to hear what their struggle is and what they really want help with.
   - ◊ Do they need a Virtual Assistant or someone to help organize their files?
   - ◊ Do they need a social media manager or some tasks implementing?
   - ◊ Listen for their PAIN, and see if you can help solve their pain (be truthful).
   - ◊ If you can't, find someone who can

2. **Services Needed:** What Tasks / Services is the company looking for? (Check below)

(See Niche Market for what tasks available to offer)

- Microsoft Office
    - Word

virtual assistant training network

  - Excel
  - PowerPoint
  - Access

- Microsoft Publisher

- Open Office (very similar to MS Office)

- Email Organization
  - Microsoft Outlook
  - Gmail
  - Yahoo Mail

- Database Management
  - General
  - Industry Specific ________________________________

- Website Updates
  - General
  - HTML
  - SEO

- Pictures
  - Upload and tag

- Blogs
  - Writing
  - Distributing

- Articles
  - Writing
  - Distributing

- Event Posting

- Distribution Event Websites
- Adding Pictures and Links

- Bookkeeping
  - Basic Accounting
  - Quickbooks

- Filing (In Office)
  - File Management
  - Organization

- Social Media
  - Facebook Fan Page
  - LinkedIn
  - Twitter
  - YouTube
  - Google+
  - Instagram
  - Pinterest
  - Hootsuite
  - Tweetdeck

- Profiles Set Up? (i.e. Facebook, Twitter, YouTube, etc.)

- Zoho (Project Management)

- BaseCamp (Project Management)

2. **Budget for VA for each month?** (This will help you determine the amount of time you can offer them). For example – if they only need social media updates a few times a month – that is only a few hours of your time. If the client needs daily interaction – there is much more time needed.

3. **Time:** Will the client need help one time or on a consistent basis (can offer a better rate if they work with you for a longer period of time).

4. **Deadline:** What is the deadline for the project? (I always need at least 72 hours to complete a request, unless it is an urgent matter).

5. **Thank Them Verbally**: Thank them for their time on the phone. The call should not last more than 30 minutes (15 minutes is ideal).

6. **Thank Them in Writing (electronically)**: Send a thank you email and when you promise to deliver the Proposal via email.

7. **Calculate**: The amount of time you will need to do the tasks required. (See VA Time Checklist for Potential Client)

8. **Send Proposal** on specified day (as promised or a day earlier). Be sure to note what date the proposal is good through. (I have had some clients call me 1 year later and want to use an old proposal..:o))

   ◊ For your protection, be sure to send the document as a .pdf document (can not be easily edited).

   ◊ Here is a link for a free program that will allow you to transfer a Word document to a .pdf format.

      a. **PDF Creator (**http://sourceforge.net/projects/pdfcreator/) Simply select a printable Windows file, print to the PDFCreator and your document will save in PDF format. You can then read, print or e-mail the finished product. (this specific info compliments of Kim Komando (www.Komando.com)

9. **Set up a Reminder** to follow up with client to see status of proposal. (You can use www.FollowUpThen.com to have an email reminder sent to your inbox).

10. <u>Date Verification</u>

Date Proposal Sent:

Date Follow Up Email:

Date Signed Proposal Received:

Date sent client copy of Signed Proposal:

Date Money Received from Client:

Please Note: Keep a copy of this in your client file (paper) and also on your computer. For example, I create folders in Gmail and add all of the client documents to that folder. This way if I ever need to find it, I have a copy online and also in my office paper folder.