How to
Create Great Client Relationships

You have a new client and you are justifiably proud of how you helped the client see that you would be just the right person to help him or her become or succeed as an speaker. But your work together is just beginning…

The first order of business is to get a signed contract so that you have set the ground rules that will keep communications clear. There can be a great temptation not to insist on a contract because you do not want to do anything that will give them another opportunity to decide not to work with you. If you are going to lose a client, better to lose them at the beginning before any damage to that relationship or your reputation has occurred. If the client is not willing to help you document expectations and commitments, then that person is unlikely to be a good, paying client over the long run. Do not sell yourself short – insist on a fair contract.

Once the contract is signed and the relationship is official, it is time to start work. The next step is to collect all the information from the client you will need to work effectively. A simple way to do this is to run through the **New Client Checklist** to make sure you have what you need.

The checklist includes all the background information you will need on the speaker to do your best work.

Setting the Tone for Great Communications

Attitude is Everything

Most of us think our clients selected us for our skill and expertise. While that is true in part, they generally select us for our attitudes when those attitudes match theirs. Clients who appreciate quality or meeting deadlines will listen for those words that tell them that you share those attitudes.

Almost every client is looking for someone who will make work easier and more enjoyable. When things are tough, we call those who we can count on to help ease the burden. If the client anticipates that you will be too busy, not focused or not happy when you pick up the phone, sooner or later that client will stop calling.

If a client ends the business relationship with you, the client may say that he or she could not afford your services. This leads many assistants to think they cannot charge what they need to in order to make a living. But money is a convenient excuse for most people who are really leaving for different reasons. We can't question it if clients say they are cutting back and cannot budget for our services. If they told us the truth, that they just didn't find us helpful or efficient or that we were missing deadlines, we might argue the point. What they are really saying is that we didn't prove our value to them. Our work is to assist our clients. If we are not improving their lives in ways they find value, they will not continue to pay for our services.

Deadlines and Commitments

Your client will be looking for early indications that you are easy to work with, do what you say you will do and will meet commitments. One of the standards you will want to meet in every client interaction is to under promise and over deliver. This means that if you say you will call him or her on Monday before 10 am, that you make that call by 9:59 am, not 10:15 or 11 am. If you promise to send an email by end of business on Wednesday, that you do not send it on Thursday or Friday.

What you say, what you commit to, has meaning. Some speakers will expect a lot of structure around their communications and others will communicate much more loosely. But you are a professional, and these are some of the professional standards to which you should hold yourself accountable, regardless of how the client works.

It is easy to get very informal with clients, especially those with whom we get to know their lives well. Regardless of how comfortable it seems, your clients are paying you for your work and for the professional quality of that work. If your work begins to feel to the client like it isn't taking your full concentration or that you are just getting to it when you have a chance, they may decide you are not worth the professional price you are charging. It is perfectly fine to have fun and enjoy your work and your working relationship with your clients. However, do not let that diminish the quality of your work in any way.

Sending Emails

This especially extends to the sending of emails. Use a salutation for every email, "Dear Pat" and end with your name, phone and email signature. You never know to whom an email will be forwarded and what conclusions the receiver will draw about your professionalism.

The use of the subject line is also very important in sending emails, especially when you or your client is trying to find one later. Make sure the subject line is appropriate to the email and not one more response to an email sent earlier about a different topic. Finally, never carry on a disagreement with a client via email. Never hit "send" in the heat of the moment or without enough thought.

Talking by Phone or In Person

Another hallmark of the professional is taking the initiative to communicate often. Some types of reporting are more formal, such as giving the speaker a written report on the progress of the permissions process where they can see a spreadsheet about what has happened since the last report received.

Other reporting is more informal, like letting the speaker know if there has been a change in the timeline with one of the professionals.

Talking often will eliminate many of the assumptions we tend to make about what the other person would want us to know or to do.

If for any reason you cannot meet a commitment to a client, then it is up to you to make a phone call to let him or her know. The best way to handle this is to give the client some options about best next steps. For instance: "There have been so many customer calls that have come in about your book that I will not be able to send that email until Thursday morning. Is that all right or would you like to handle this a different way?"

Always let the client know about any problem (or opportunity) before the fact instead of apologizing later if at all possible.

Full Force Collaboration

You and you client have decided to work together, to collaborate to make this relationship the best it can be. It is in that spirit that you owe it to your clients (and they owe it to you) to speak up when you see or hear something that gets in the way of project success. Challenges can come up in the systems you have or communications between the two of you or others, or simply because there is so much work to do or that your styles of working are different.

Call a "time out" when these things happen and set aside time to figure out how best to work them out. Your clients will be impressed that you put the success of the project before any discomfort about bringing up subjects that might create controversy. Stay away from blame and instead focus on what can make the work smoother, more enjoyable and more productive. This will make these sometimes challenging conversations easier.

This is what we call "full force collaboration." Each person brings his or her best to the table. We will not always agree on how things should be done, but we should always say what we believe to be right and true. When said in a respectful way, most clients will listen and appreciate your passion and caring and that you have expertise that is important to their ultimate success.

Marketing to Clients Old and New

Even after you have signed a contract with a client your marketing work continues. Current clients are both your best source of profitable continuing work and your best source of new clients. Any other way of marketing is more costly and less effective than staying in touch with current clients in a way that helps them help you with additional work.

We often forget to tell our clients when we acquire new skills or expertise that they might be able to use. Ask clients for testimonials (after at least 3 months of successful work together and not before) and ask them if they have business associates whom you might assist. The best time to ask is when you have just experienced a great success together, not when you find yourself in need of new clients.

We also forget to say "thank you" to our clients by sending them an article or newsletter or communication, not about things we want them to know, but things they will find interesting in their businesses. For speakers there is nothing they would rather receive than some new material that you have found on their subject of expertise which might help them talk about a new and relevant topic. If you don't have access to topic related information, send them information about creating products, seminars, webinars, training or membership sites. Keeping great clients is worth spending just as much time on as getting new clients.

Success Mindset

I am 100% percent responsible for all my relationships. Even if the miscommunication is the client's fault, I can do a lot to make sure that things aren't missed or neglected. If the client were perfectly organized or prepared, he or she wouldn't need me!

My job is to help the client with his or her speaking business, but also to make his or her life and work run more smoothly. I make it my mission every day to consider how I can add value to our relationship and make his or her day with an encouraging email or by solving pressing problems. I will do my best to anticipate problems and learn new things that will benefit my clients.

New Client Checklist for Virtual Assistants

Date	
Client Full Name	Nickname
Business Name	
Web site	2nd Web Site
Email	2nd Email
Home Phone	Work Phone
Cell Phone	Fax
Billing Address	
Shipping Address	
Referred By	☐ Thank you sent

Services Requested

Needs Assistance With		
Requested More Information On		
Budget		
Estimated Hours Per Month		
Next Steps		
☐ Proposal sent	☐ Contract sent	☐ Contract signed and received

Client Personal Info

Birthday	Other Important Dates
Interests/Preferences	
Family Info	

Passwords

Web Site	User ID	Password

Notes

SAMPLE CLIENT THANK YOU / TESTIMONIAL AND REFERRAL REQUEST EMAIL

Dear

I wanted to take a moment and thank you for the opportunity to work with you over the last few months. I have truly enjoyed getting to know you and your work and it has been a privilege to help you organize your speaking business.

I thought you might enjoy reading a good article I recently came across on doing successful webinars, an area I know you are exploring. With the permission of the author, it is up on my site at www.SpeakersAssistPro.com/articles.

Because marketing is a part of my business as it is yours, I would be so appreciative if you would consider providing a testimonial about our work together. Your opinion means a lot to me as it does to everyone else in our industry.

I am always looking for more clients like you who are wonderful to work with and who do work I'm proud to represent. I am particularly looking for speaker clients who might need help in organizing and marketing their speaking businesses.

Again, thanks for the opportunity to work with you and I look forward to our next steps together!

Sincerely,

Pat Smith
Professional Virtual Speaker's Assistant
Pat@SpeakersAssistPro.com
www.SpeakersAssistPro.com
310-906-0978