



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 her become or succeed as an author. But, of course, 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 a list of projects you will be working on, giving each a priority, a preliminary deadline and a list of the author's expectations or preferences.

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 service. This leads many assistants to think they cannot charge what they need 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 authors 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 will be drawn about your professionalism by the receiver.

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 sufficient 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 author 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 author 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 your client have decided to work together, to collaborate to make this book 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 authors, there is nothing they would rather receive than a new marketing method that you have expertise on that might help them increase sales. Keeping great clients is worth spending just as much time on as getting new clients.

**Sample Client Thank You/
Testimonial and Referral Request Email**

Dear Julie,

I wanted to take a moment and thank you for the opportunity to work with you over the past several months. I have truly enjoyed getting to know you and your book and it has been a privilege to work with you on your marketing.

I thought you might enjoy reading the attached article on virtual book tours, especially about some of the more successful ones. If you decide a virtual book tour is right for you, I would be glad to help you put that together.

Because marketing is a part of my business as well as yours, I would be honored if you would consider providing a testimonial that I could add to my web site about our work together. I am always happy to take on new clients who are referred by wonderful authors like you, so please remember me to any business colleagues who might be writing a book. I offer a free initial consultation so I hope to make it as easy as possible for those considering taking the big step to becoming an author.

Again, thanks for the chance to work with you and I look forward to our next steps.

Best wishes, Susan

Susan Jones
Professional Virtual Author's Assistant
Book publishing made easy for first time authors
Susan@BookEntrepreneur.com

Success Mindset:

I am 100% percent responsible for all my relationships. Even if the fault of the miscommunication is the client's, 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 book, 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.

SAMPLE CLIENT PROPOSAL LETTER

Mr. Tom Walters
ABC Company
211 Broad Street
Erie, PA 16502

Dear Tom,

Thank you for giving me the opportunity to give you a proposal on how we might work together to get your book successfully published and sold.

After talking with you by phone and reading through the materials you sent me, and considering the budget you shared, I would like to propose a plan for the next several months, to help you get your book published and then to begin a marketing effort. That plan is outlined on the document attached.

I invoice monthly and my rate for services is \$50 an hour. My best estimate is that we can get the work done that you need in approximately 10 hours a month, although that might vary and be more intensive during the month your book is published.

I would be happy to talk to you by phone in further detail about this proposal. If you would like to go ahead, let me know and I will send a simple agreement for your signature before we begin work.

I think your book topic is a very important one and it would be my pleasure to help you get your message out to the world!

Thanks again for your time and consideration.

Best wishes, Susan

Susan Jones
Professional Virtual Author's Assistant
Susan@BookEntrepreneurs.com

Book Publication and Marketing Plan for
The Wow Factor: Meeting the Needs of Your Customers in a Market Driven Economy

Hours to
Complete

| Month | Project | Estimate Hours to Complete |
|----------|---|----------------------------|
| February | Coordinate necessary permissions to use quotes and interviews | 10 |
| March | Find book designer, Get book numbers and listings (ISBN, LCCN), get printer account | 10 |
| April | Coordinate back cover materials (author photo, back cover copy, testimonials) | 10 |
| May | Get book to printer, handle proof copy and any corrections. Book due May 25 for conference on May 30. | 10 |
| June | Determine media list and send out initial copies to reviewers | 10 |
| July | Brainstorm future marketing opportunities, start virtual book tour | 10 |



Contract for Author's Assistant Services

This agreement made on June 1, 2011 between Tom Walters of ABC Company of 234 Main Street, El Segundo, CA 90245, the Client and Susan Jones of 531 Main Street, El Segundo, CA 90245, the Assistant.

1. Services to be Performed.

Assistant agrees to perform book and author-related administrative services for the client, included but not limited to those involved in preparing the manuscript for publication, services involved in the publishing process and book marketing and promotion.

2. Payment.

In consideration of Assistant's performance of these services, client agrees to pay Assistant \$50 an hour for each hour of service, with services billed in 15 (fifteen) minute increments, There is a one hour minimum for services each month, but that may be applied to future work if services were not provided during the month. Invoices will reflect out-of-pocket expenses such as shipping charges, special office supplies or copying and printing, if agreed to in advance.

3. Invoices.

Assistant will email invoices for services performed and expenses at the end of each month via PayPal. Acceptable forms of payment are eCheck or by credit card, via PayPal. Terms of the invoice are net 10 (ten). Payments not received by due date may result in work cessation.

4. Independent Contractor.

The parties intend Assistant to be an independent contractor in the performance of these services. Assistant shall have the right to control and determine the method and means of performing the above services. The client also retains the right to perform services for other clients.

5. Work Product Ownership.

Any works ideas, discoveries, products or other information developed in whole or in part by the Assistant in connection with the services provided under this agreement shall be the owned exclusively by the Client.

6. Confidentiality.

All books, records, materials, calculations, documents, communications, notes, reports furnished to the Assistant by the Client will be considered as confidential. All work done by the Assistant for the Client will be considered confidential and the Assistant will keep such materials in controlled access files. The confidentiality provision of this agreement will main in effect for one year after the termination of this agreement.

7. Term of Agreement.

This agreement is valid for one year from signature date and may be terminated by either party with 15 (fifteen) days written notice by either party.

8. Entire Agreement.

This agreement contains the entire agreement of the Assistant and the Client and there are no other promises or conditions that are part of this agreement, written or oral. This agreement supersedes any prior written or oral agreement between the parties.

9. Applicable Law.

This agreement shall be governed by the state of California.

The undersigned have agreed this day, _____.

Client Authorized Signature

Susan Jones, Assistant

Client Name Printed

Client Address

Email

Phone

Social Security# (US) or Federal ID (US and UK) or CN (Canada) or ABN (Australia)