



Welcome to...

# How to Create Great Client Relationships



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## Helping Set Client Expectations



### Do you know what your clients expect from you?

If you have a new client and you are justifiably proud of how you helped the client you should be just as proud because the help you delivered is essential to the success of your business. But, of course, you work together in partnership.

**Setting the Tone for Great Conversations**  
Establishing a positive relationship with the client is the key to a successful partnership. This is the foundation of all great client relationships. It is the basis of all successful client relationships. The more you know about your client's expectations, the better you can serve them. This is the key to a successful partnership.



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## Turning Prospects Into Clients

New Client Checklist for Virtual Author's Assistants		
Name		
Business Name		
Role		
Phone		
Email		
Website		
Client Name		
Client Address		
Client Phone		
Client Email		
Client Website		
Client Business		
Client Services		
Client Budget		
Client Timeline		
Client Expectations		
Client Needs		
Client Goals		
Client Challenges		
Client Opportunities		
Client Risks		
Client Strengths		
Client Weaknesses		
Client Assets		
Client Liabilities		
Client Cash Flow		
Client Profit Margin		
Client Break Even		
Client Return on Investment		
Client Net Present Value		
Client Internal Rate of Return		
Client Payback Period		
Client Sensitivity Analysis		
Client Scenario Analysis		
Client Risk Management		
Client Insurance		
Client Tax		
Client Legal		
Client Accounting		
Client Marketing		
Client Sales		
Client Customer Service		
Client Human Resources		
Client Information Technology		
Client Operations		
Client Logistics		
Client Procurement		
Client Production		
Client Quality Management		
Client Research and Development		
Client Strategic Management		
Client Supply Chain Management		
Client Sustainability		
Client Business Model		
Client Revenue Model		
Client Cost Model		
Client Profit Model		
Client Risk Model		
Client Opportunity Model		
Client Challenge Model		
Client Goal Model		
Client Strategy Model		
Client Action Model		
Client Execution Model		
Client Results Model		
Client Feedback Model		
Client Learning Model		
Client Improvement Model		
Client Innovation Model		
Client Disruption Model		
Client Business Process Model		
Client Business System Model		
Client Business Model		
Client Business Plan Model		
Client Business Proposal Model		
Client Business Case Model		
Client Business Pitch Model		
Client Business Agreement Model		
Client Business Contract Model		
Client Business License Model		
Client Business Patent Model		
Client Business Trademark Model		
Client Business Copyright Model		
Client Business Intellectual Property Model		
Client Business Confidentiality Model		
Client Business Non-Disclosure Model		
Client Business Assignment Model		
Client Business Partnership Model		
Client Business Joint Venture Model		
Client Business Merger Model		
Client Business Acquisition Model		
Client Business Divestiture Model		
Client Business Spin-off Model		
Client Business Recapitalization Model		
Client Business Reorganization Model		
Client Business Restructuring Model		
Client Business Turnaround Model		
Client Business Bankruptcy Model		
Client Business Liquidation Model		
Client Business Sale Model		
Client Business Exit Model		
Client Business Succession Model		
Client Business Estate Planning Model		
Client Business Wealth Management Model		
Client Business Retirement Model		
Client Business Tax Planning Model		
Client Business Estate Tax Model		
Client Business Gift Tax Model		
Client Business Charitable Tax Model		
Client Business Capital Gains Tax Model		
Client Business Dividend Tax Model		
Client Business Interest Tax Model		
Client Business Property Tax Model		
Client Business Income Tax Model		
Client Business Corporate Tax Model		
Client Business Personal Tax Model		
Client Business Trust Tax Model		
Client Business Estate Tax Model		
Client Business Gift Tax Model		
Client Business Charitable Tax Model		
Client Business Capital Gains Tax Model		
Client Business Dividend Tax Model		
Client Business Interest Tax Model		
Client Business Property Tax Model		
Client Business Income Tax Model		
Client Business Corporate Tax Model		
Client Business Personal Tax Model		
Client Business Trust Tax Model		

### New Client Checklist

- Tell me something about your book and how I can help?
- Would you be comfortable sending me your book and any sales or planning documents you have put together?
- What is your timeline?
- Is there anything you can share with me about your budget or would you like me to just propose to you what this might cost?



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## Proposal to Contract



Mr. Tom Winton  
ABC Company  
211 Broad Street  
San, CA 10002

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 tight time frame, 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. This plan is outlined in the document attached.

I invoice monthly and my rate for services is \$50 per hour. My best estimate is that you will get the work done in 300-400 hours, which approximately 70 hours a month, although this 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 I would be my pleasure to help you get your message out to the world!

Thanks again for your time and consideration.

Best wishes, Pat

Pat Smith  
Professional Virtual Author's Assistant

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- What can you do for me to further my goals?
- How much will it cost me?
- How do I know it will be worth the money?

## Proposal to Contract

Book Publication and Marketing Proposal for

*The Wow Factor: Meeting the Needs of Your Customers  
in a Market-Driven Economy*

Month	Project	Estimated 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

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## Author Services Contract



Contract for Author's Assistant Services

This agreement made on June 1, 2008 between Tom Winton of ABC Company at 211 Main Street, San Francisco, CA 90240, the Client and Pat Smith at 555 Main Street, San Francisco, CA 90240, the Assistant.

- Services to be performed.** Assistant agrees to perform back and author related administrative services for the client, including but not limited to those involved in preparing the manuscript for publication, services involved in the publishing process and book marketing and promotion.
- Payment.** In consideration of Assistant's performance of these services, client agrees to pay Assistant \$50 per hour for each hour of services, with services billed in 15 fifteen minute increments. There is a one hour minimum for services each month, but that may be applied to cover work if services were not provided during the month. Invoices will reflect out of pocket expenses, such as shipping charges, official office supplies or copying and printing, if agreed to in advance.
- Invoices.** Assistant will email invoice for services performed and response at the end of each month to Client. Acceptable forms of payment are ACH, or by credit card, or PayPal. Terms of the invoice are net 30 days. Payments not received for 60 days may result in work cessation.
- 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.
- Work Product Ownership.** Any works done, documents, 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 correct exclusive by the Client.
- 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

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## Great Client Relationships



- Attitude is everything
- Meeting deadlines and commitments
- Constant communications - emails and reports
- Think of yourself as 100% responsible for the relationship

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## Marketing to Clients Old and New



- Send articles of interest on the subject matter of the author's book or on publishing
- Send opportunities for the client to succeed
- Say thank you in ways that matter to the client

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## Asking for Referrals and Endorsements

**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 team 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 unusual ones. If you decide a virtual book tour is right for you, I would be glad to help you get that up and running.

Because marketing is a part of my business as well as yours, I would be honored if you would consider providing a testimonial that would add to my website about our work together. I am always happy to take on new clients and am referred by wonderful authors like you, so please reach out to my business colleagues who might be writing books. 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,  
Pat  
Pat Hanks  
Professional Virtual Author's Assistant  
Book publishing made easy for the freelance author  
Pat@PublishingAndBooks.com  
www.PublishingAndBooks.com

- Only ask for referrals and endorsements after you have worked together for at least a few months
- Figure out how to do joint marketing or something worthwhile for both of you

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## Thanks for Watching and Listening!

You just completed the slidecast in red below.

- 4-1 Attract Authors with Your Web Presence
- 4-2 Identify Authors as Business Prospects
- 4-3 Get Referrals with Personal Networking
- 4-4 Create Clients from Prospects
- 4-5 **Create Great Client Relationships**
- 4-6 Become a Resource Through Speaking and Writing
- 4-7 Create Media Opportunities

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