

---

# Potential Client Checklist

## *TEMPLATE*

---

# Potential Client Checklist

## TEMPLATE

Make use of this template when you speak with potential new clients to build trust and to determine whether you might be a good fit to support their business.

Treat the call as a “get to know each other” call, where you speak about your values, and how you approach your work, and you can also find out more about their unique requirements.

Some initial questions that you might want to ask are included in this template –be sure to make it your own!

- ✓ How did you find out about me? *It's a great conversational starter if you can find common grounds!*
- ✓ Could you tell me a little about yourself, and your business? *Again this is just a great way to open a dialogue about how your expertise can support their business growth. Find ways to relate to what they are saying based on your previous experience.*
- ✓ Have you worked with a Virtual Assistant before? *If the prospect has worked with a virtual assistant, don't hesitate to ask how the partnership went, and why they are seeking help from someone else.*
- ✓ What are the main tasks you are looking to delegate? *This doesn't have to be an inquisition – but it should give you an overall idea of the scope of the work.*
- ✓ Who currently does these tasks? *If the client is currently doing the tasks, you can find out if any of them are documented.*
- ✓ Do you use specific software and tools in your business? *This is a great way to find out whether 1) you are qualified, and 2) showcase your expertise!*
- ✓ Are you looking for support ongoing or just for a one off project? *Use this opportunity to explain why a long-term partnership is most effective and better value!*
- ✓ When are you looking to get started? *This will help you plan especially if you have other projects on the burner.*