



sumsolutions

The Online Practice Management Resource Where Freelance Bookkeepers Learn to Build and Sustain a Profitable Practice



“How to Qualify a Prospect & Work With Clients You Love”

Course Outline

Module One

Webinar: Module One Highlights – 29 minutes

Ebook:

- Introduction & Process Overview
- What Services Does My Business Offer
- What is an “Ideal” Client?
- What 4 or 5 Things Must Your Ideal Client Possess?
- What is Your Referral Process for the Business that is Not Suited for Your Company?
- What Length of Time, Days of the Segment and Hours are You Available to Speak with Prospective Clients?
- Summary

Module Two

Webinar: Module Two Highlights – 35 minutes

Ebook:

- Assignment Check-Up Module One
- Your Mindset and the Prospective Client
- Step 1: Schedule Time to Speak with Prospective Client
- Step 2: Email Reminder and Call Instructions
- Step 3: Prospective Client Lead Form
- Step 4: Making/Receiving the Call
- Summary



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Module Three

Webinar: Module Three Highlights – 43 minutes

Ebook:

- Assignment Check-Up Module Two
- Step 5: Pleasantries & “Pre-Call”
- Step 6: Your Qualifying Questions
- Step 7: Information About Your Company & Step 8 Is Prospect a Fit?
- A Few Final Words About Qualifying a Prospect
- Summary

Assignment Workbook

Module One:

- Exercise One: Identify Your Core Services
- Exercise Two: Create Your Ideal Client Profile
- Exercise Three: Create Your Qualifying Criteria
- Exercise Four: Create Your Referral Process
- Exercise Five: Create Your Process for When You Will Speak with Prospective Clients

Module Two:

- Exercise One: Create Your New Lead Form

Module Three:

- Exercise One: Write Your “Pre-Call” Script
- Exercise Two: Write Your Qualifying Questions
- Exercise Three: Write Your Company Overview, Fees & Next Steps Script
- Exercise Four: Write Your Script for Referring Out a Prospect
- Exercise Five: Write Your Script for Not Making a Referral
- Pulling It Altogether