

Email And Phone Scripts — Client Intake

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Here are a collection of the 6 proven email and phone scripts that I use as the basis of my Client Intake System. Feel free to copy and paste these to form the basis of your Client Intake System.

Prospect Intake Email Script

Heya {First Name},

Nice to meet you! :)

Thanks for applying for my {Product Name}. I'm excited to learn more about your business and see if I can help you grow! I'm selective about who I work with because I only want to take on students who I think I'll be able to help.

To get started, anything you can tell me about your business in advance via email would be helpful. (Once I hear back from you, the next step will be for us to schedule a call).

Here are a few questions to get you started:

- › How long have you been in business?
- › What types of customers do you typically serve?
- › What sorts of things do you do for your customers?
- › What's the origin story behind the company?
- › What are the main challenges you're facing these days?
- › How would you measure the success of a project together (i.e., what would a homerun look like)?

Feel free to braindump anything else that comes to mind. It'll help us get productive more quickly on our call.

I'm looking forward to your answers!

Thanks,

{Your Name}

'Schedule a Call' Email Script

Heya {First Name}

Nice to meet you! I'm honored that you'd like to bring my brain into the mix. :)

I'd be delighted to talk this week or next week. Please use the link below to select any available slot in my calendar. We may not need the full 45-minutes, but let's start there just in case:

{Link to Calendar Booking Tool}

I'm looking forward to our call next week!

Thanks,

{Your Name}

'Initial Prospecting Call' Phone Script

OPENING THE CALL

"OK, so we have 30 minutes and have another call straight after you so we'll need to keep to time, is that OK?"

[—yes]

"Thanks for that. So my job today is really simple. I'm going to ask you a bunch of questions, to work out IF or HOW I can help you. If I feel like I can't help you, I'll let you know politely, and do my best to point you in the right direction. If I feel like I can help you, we'll book in another time to talk about how — is that OK?"

[—yes]

"Perfect, let's get started."

QUESTIONS

- › Tell me about your business. How does your business make money?
- › How can I help?
- › Why start now vs six months from now or six months ago?
- › Why choose me? Why do you think I'm the person to call?
- › What's holding you back from getting the results you want?
- › What specifically is broken, missing, or not working?

- › You've mentioned a few issues, which has greatest impact in the short term?
- › Let's say I approve you as a client today. Can you walk me through the process of you deciding to work with me?
- › What questions do you have for me?

SUMMARIZE

"It sounds like your top 3 problems are:

- › You want result but obstacle,
- › You have problem and it's costing you impact, and
- › You don't have desired_thing and it's hurting you because cause."

CONCLUSION

BAD FIT: "At the start of our call I said I'd ask you a bunch of questions to work out if or how I could help you. Based on what you said, I don't think I'm the right guy for you. But I do want to support you in a different way. You should talk to..."

GOOD FIT: “It sounds like we’re a good fit. “The next step for us is to book another time to talk about how I can help you reach your goals.”

‘Recommended Next Steps’ Email Script

Heya {name},

It was wonderful to chat with you and learn more about {company name}. It was great to discuss {client’s goal’s / objectives}. After our call, I’m confident that I’d be able to help you move forward and grow.

I’ve outlined a few options below. I recommend the first option, but any of these will help you as you grow.

{description of the first option} {description of the second option} {description of the third option} Another option would be to schedule a paid call to dive deeper into your problem and begin offering specific, actionable advice to you and your team to {client’s goal / objective}. (A consulting call is billed at \$X/hour. You

can pay for and schedule a call here: {link to pay for call}

Am I explaining each of these well?

As a next step, just reply back and let me know which option you'd like to move forward with. (And if you have any questions, excellent! Just hit reply and let me know).

Thanks,

{your name}

'Paid Phone Call' Email Script

Heya {!Name},

Thanks so much for telling me more about your problem. I may be able to help, but I'll need to learn a little more about your situation first.

I'm available for a limited number of one-hour calls every month, and would love to chat with you. I'll provide you with helpful, actionable advice focused on improving your business.

You can book your phone call here: {Link to book a paid call}

Looking forward to our call!

{your name}

‘Referral to Another Provider’ Email Script

Heya {First Name}

Thanks for your note! I’m flattered that you’d like to bring my brain into the mix. :) I really appreciate you taking the time to provide that information.

As a result of receiving so many inquiries and my schedule remaining quite full, I’m greatly selective about the projects I take on. After consideration, I will need to kindly pass on this project, but I do want to sincerely thank you for your interest and your time.

But I would love to support you in a different way. You should talk to my colleague {Colleague Name} at {Colleague’s Company Name}. They {Description of Colleague’s Company}. Email him at {Colleague’s Email

Address}, tell him {Your Name} referred you, and he may be able to help.

If you'd like another referral, reach out to {Other Colleague's Company}. As above, send them an email at {Other Colleague's Email}, say {Your Name} referred you, and they should be able to help.

Thank you for again for thinking of me for this, I'm honored.

Best of luck!

{Your Name}