

How to save time by weeding out pointless first meetings

by Amy Kurland

How often have you set aside time to meet with a new prospect, spent an hour or (several!) driving there and back, only to realize that the meeting was a waste of your time...and theirs? It's a frustrating aspect of business, and there's really no way to avoid it entirely, since the value of face-to-face interaction can't be denied. However, there *is* a simple tool you can use to greatly decrease your chances of this incident occurring more than it needs to. And that tool is the 5-10 minute phone screening.

Due to the Internet, it's never been easier to meet and work with non-local professionals. So much so that many clients today are happy to sign a contract without ever meeting you in person first. But there are still a good deal who prefer to meet with you in person before they commit to working with you (and who can blame them?) It's this last group of prospects, however, who can become big time wasters *if you don't screen them properly before meeting with them.*

Here's a screening method that works well for me:

1. Explain that you phone screen before setting up initial consultations.

When a prospect prefers to tell me the details of their project in person, I say, "That would be great. But before I meet with potential clients, I like to conduct a brief 5-10 minute phone screening to be sure we'll be a good match for each other first. Do you have time to do that now, or should we set up a time for later?"

2. Ask your potential client the following six questions:

1. What is your project?
2. What is the purpose of your project?
3. Who is your target market?
4. How will your (website, brochure, postcard, etc.) be getting to them, or how will they be finding it?
5. **For writers:** What action would you like the reader to take after reading the copy?
For designers: How would you like the reader to feel about your company after seeing the visuals?
6. What is your budget for this project?

You can learn a lot about your prospect by how they answered those six questions. What you learn will help you determine:

- if you have the best set of skills for their needs
- how marketing savvy they are and, as a result...
- how time-consuming the project might be
- how much you might want to charge them
- whether they can even afford your services

Also, by asking them questions, you're also selling yourself indirectly because your questions will demonstrate that you are experienced, think things out, and have a system that works.

3 Assuming this is a good match and you'd like to take on the job: Tell your prospect you'd like to write up an estimate that they'll receive in the next 24 hours. In the estimate include what you'll be doing for them, how many revisions they'll get, and the project price. If they want to move forward after seeing the estimate, *then* you set up a meeting.

3b. If you realize this is not a good client for you: Congratulations! You've saved valuable time that would've otherwise been wasted in a go-nowhere meeting. Whenever possible, refer these contacts to an associate who would be a better match for them. If you do so, they might remember you and refer you to one of their colleagues down the line.

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