

MARKETPLACE

The marketplace is where all of your potential new clients exist. The more specific your marketplace is, the better chance you have of dominating it.

INCOMING LEADS

An incoming lead is someone from your marketplace who has expressed interest in your products or services. Make sure they are connected to you in some way and have them fill in a website enquiry form before you meet.

QUALIFY LEAD

YES

Not all incoming leads are right for your business. Once you have assessed each lead based on their website enquiry form and your client scorecard you need to decide whether or not they are a good fit.

NO

REFER FORWARD

If you choose to pass on the incoming lead, refer them onto someone who might be better suited to help them. Passing referrals on is a great way of getting referrals back.

REQUEST MEETING

If you choose to work with the incoming lead, request an initial meeting and use your meeting agenda to collect all the information you need from the client.

SUBMIT PROPOSAL

Submit or present your proposal based on your initial meeting and what you understand to be important to the client. Remember, a proposal needs to propose a clear solution to their problem.

EDUCATE AND NURTURE

Continue to educate and nurture your lead through drip emails. Do not call to follow-up on your proposal.

NO

YES

ONBOARDING

Once the client approves your proposal, set clear expectations and put your client through an onboarding sequence to establish communication guidelines and deliverables.

REFERRALS

Systematically refer leads to your existing clients and professional network and host referral networking functions to position yourself as the linchpin in your network.

DELIVER PROJECT

Use sitemaps, prototypes and staggered approval stages to keep the project and client on track. Schedule weekly project updates to stay proactive.

NURTURE

If the client chooses not to work with you at this stage, continue to nurture them through drip emails and marketing campaigns to drive them into other parts of your business (hosting, maintenance plans, social media, strategy consulting etc).