

Potential Client Checklist

- ___ Download the **Potential Client Process Asana Template** from Templana and upload it to your personal Asana account
- ___ Duplicate this template so that you always have a version of our template, name the new copied version [Design Firm] Potential Client Process Template
- ___ Work through your new asana template and customize the email and scripts to your firm
- ___ This is now YOUR template so whenever you get a new PC, duplicate this template and change the project name to PC - NAME - CLIENT CODE
- ___ Download the documents we use for the Initial Meeting, save them in your Google Drive for easy reference
- ___ Order the **laser measure** so that you're prepared for your next meeting if you haven't already
- ___ Create a marketing one sheet. We used Canva.com to create ours
- ___ Practice responding to common objections that clients have around the proposal
- ___ Customize your **Lead Tracker template**
- ___ Create your own lead nurture series and use ours as inspiration. If 6 emails seems like too much work, start with something more attainable like 3 emails. We use activecampaign.com for our email marketing and automation
- ___ Make an Asana reminder to create a holiday card with your latest photos in October. Add promising potential clients to your holiday card list. Start this process early as it takes time. We use Minted.com for our holiday cards
- ___ Research a resource that allows the potential clients to sign the agreement digitally such as Eversign, DocuSign, PDFiller, etc.
- ___ Reach out to your design software and learn how to send the design fee digitally