Paige.

The PlayBook
MEMBERSHIP

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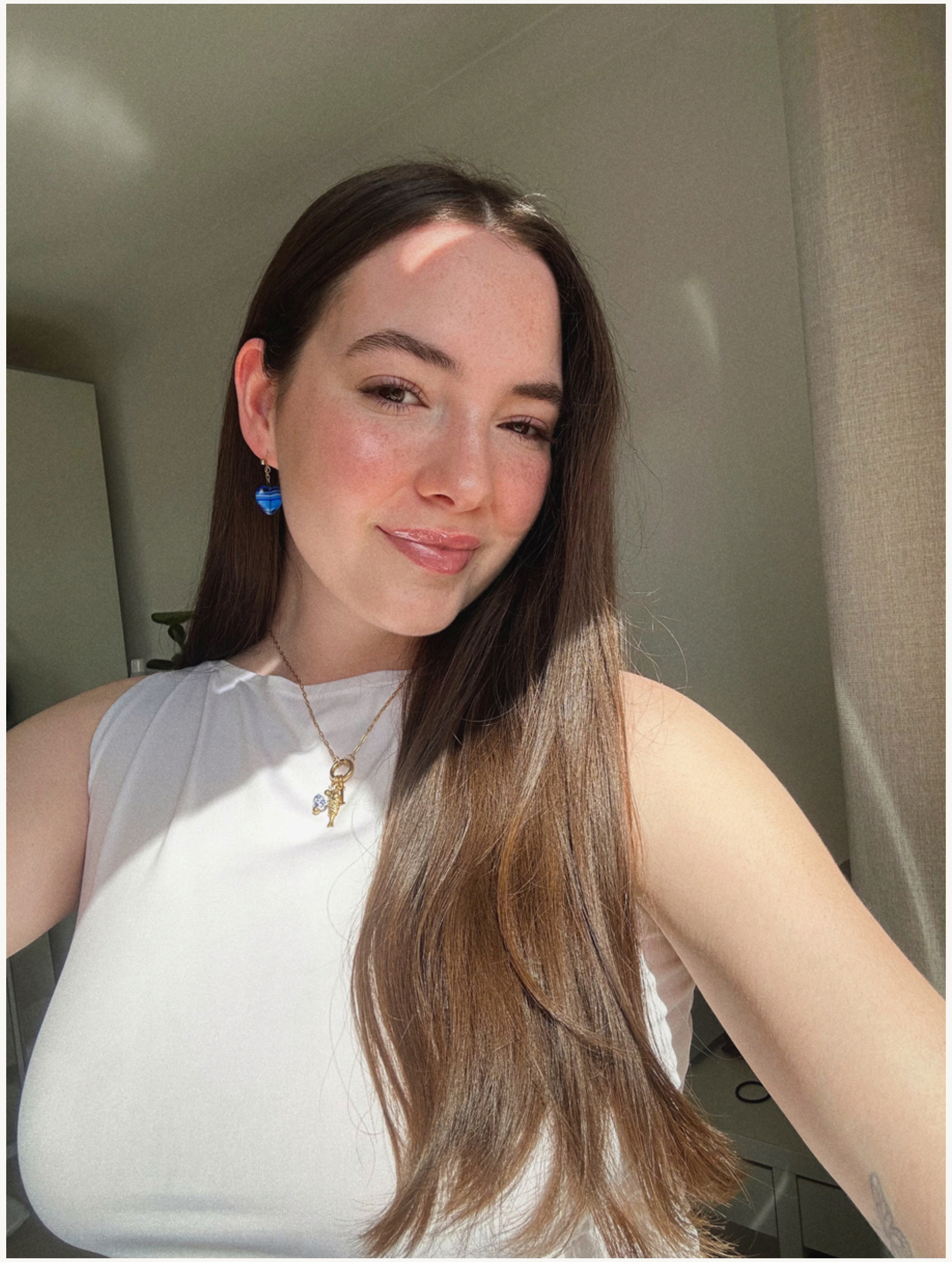
HANNAH WALKER *Social*

Guest Expert Lesson

@HANNAHWALKERSOCIAL



Hi, I'm Hannah!

~ FOUNDER, SOCIAL MEDIA LOVER, AND CAT MOM

~ FRESHLY 25 & ALWAYS GIVING LIBRA ENERGY

~ GRADUATED WITH A 1ST CLASS DEGREE IN MEDIA COMMS FROM NEWCASTLE UNIVERSITY

~ IN MY SPARE TIME YOU CAN FIND ME: READING A COWBOY ROMANCE, PERFECTING MY PAINTING SKILLS, OR GETTING OUT INTO THE YORKSHIRE COUNTRYSIDE

Building Strong Client Relationships

~ SETTING BOUNDARIES & EXPECTATIONS EARLY ON

~ CLEAR & PROFESSIONAL COMMUNICATION SYSTEMS

~ BUILDING TRUST AND RELATIONSHIPS THROUGH TRANSPARENCY

~ MANAGING RED FLAGS & DIFFICULT CLIENT SITUATIONS

Setting boundaries and expectations early on

ONBOARDING ROUTINES,PEOPLE PLEASING,
AND WHERE TO DRAW THE LINE

PUTTING TOGETHER YOUR ONBOARDING PACK

Your onboarding pack should include all the information that a new client might need, and acts as a space to set out our boundaries and expectations from the get go.

You might want to include:

- a short bio/introduction about yourself (and your team members if you have them)
- your working hours
- your contact information
- your invoicing and payment expectations
- your ‘out of office’ policy
- any deadline/content revision policies

SETTING AND ENFORICING YOUR BOUNDARIES (AKA THE TRICKY BIT!)

Falling into a pattern of people pleasing, saying yes to last minute work, and disrupting your work life balance to impress a new client can quickly lead to burn out - truly a business owner's worst nightmare - as well as your client expecting the same allowances in the future.

To enforce your boundaries:

- be firm but fair - you don't need to be rude, but you also don't need to be a pushover.
- refer your client back to their onboarding pack.
- find little tricks to help you stick to your boundaries - e.g., if you're guilty of replying to a client email who wants some last minute work doing at 9pm, try blocking your email notifications and work apps after 5pm (I use Opal for this and I love it!)

Clear and professional communication systems

CLIENT PORTALS, CONSIDERING YOUR TONE,
AND KEEPING EVERYONE IN THE LOOP

CHOOSING THE COMMUNICATION SYSTEM THAT IS RIGHT FOR *YOU*

With a million and one options out there, trying to pick the right communication system for you and your clients can be overwhelming - especially if you don't even know what you need.

To get a clearer picture of the boxes your perfect system needs to tick, ask yourself these questions:

- How many people need to be communicating with each other?
- Are the relationships you have with your clients more formal or informal?
- Do you typically send long messages, short messages, or both?

THE OPTIONS ARE ENDLESS (AND THAT'S A GOOD THING!)

When it comes to picking a communication system, an all-in-one client portal/dashboard is always a good idea. One centralised space for communicate with clients, planning, approvals, etc., is easy for both you and your clients (no need to get familiar with 10 different platforms), and can help you stay organised.

Popular options include:

- Notion
- Hootsuite
- Monday.com
- Sprout Social
- Later

Building trust and relationships through transparency

HOLDING YOURSELF ACCOUNTABLE, ASKING FOR HELP, AND HONESTY AS THE BEST POLICY

MESSING UP IS INEVITABLE SO LEARN TO HOLD YOURSELF ACCOUNTABLE

Mistakes are going to happen - we are only humans after all! - but the way you handle them can be make or break for your client relationships, so accountability is always key for building trust.

How to communicate with your client when you've messed up:

- Let them know first - don't wait for them to notice and get in touch
- Be 100% honest and let them know that you've made a mistake, apologise, and let them know you're fixing it
- Ask yourself: "what needs to change so this doesn't happen again?"
- Be proactive and make any necessary changes to your systems

YOU ARE THE PROFESSIONAL, SO ACT LIKE IT!

Your clients are working with you because they value and need your expertise to help them with their socials, so it’s important to be completely transparent and honest when giving your opinions and insight on professional matters.

Don’t be afraid to speak your mind - even if it goes against what your client is saying - they will probably appreciate that you respect them enough to be honest, and start to trust you as results come in.

ASKING FOR HELP ISN'T A WEAKNESS

Don't be afraid to ask your client for a little extra guidance if you need it. It may sound like a weakness or something you should avoid doing, but actually shows your client how dedicated you are to capturing their vision.

Asking for guidance also:

- avoids wasting time
- builds a collaborative working relationship between you and your client
- leads to better outcomes and client satisfaction

Managing red flags and difficult client situations

DISCOVERY CALLS, LEGAL CONTRACTS, AND SPOTTING THE RED FLAGS

DON’T WORK UNTIL A LEGAL CONTRACT IS SIGNED

Having a legal contract in place is so important to protect both you and your clients. This can all be done online with tools such as Docusign, which will allow your client to sign from their device.

In your contracts, you might want to include:

- invoicing/payment rules
- a breakdown of the work that will be done
- contract termination guidelines
- any other expectations or rules you want in place.

NEVER SKIP A DISCOVERY CALL

It's easy to think that a prospective client is the perfect fit over email or DM, but meeting face to face or via video call is really the gold standard for this and should never be skipped.

Discovery calls allow you to:

- get a more detailed understanding of a potential client's expectations
- figure out if you have capacity for the workload
- see if you get on well
- spot any potential red flags

FIGURE OUT YOUR NON-NEGOTIABLES AND RED FLAGS

These are the client behaviours that you are just not willing to tolerate - ideally you want to be spotting these before you take them on, which is why discovery calls are so important.

Take some time to figure out what your non-negotiables/red flags are, e.g.,:

- issues with paying on time
- constantly late for calls and meetings
- frequent last minute requests
- disrespectful language towards you/your team
- unrealistic expectations

IT'S NOT THAT DEEP TO END A CONTRACT

Sometimes it just doesn't work out - no matter how many times you reinforce your boundaries or how many chances you give a client to change their behaviour. In these situations it can be best to end the contract, especially if it's starting to have a knock-on effect on your personal life or other client workload.

Ending a contract can be scary, but remember:

- there will always be more aligned clients out there to come along
- no amount of money is worth sacrificing your work life balance and boundaries for
- you do not deserve to be disrespected in your place of work

Key takeaways and to-dos

TO DO:

- create an onboarding pack to send to new clients
- figure out your communication priorities and research the platforms that fit
- create a legal contract that new clients will sign prior to onboarding
- write a list of your non-negotiables and red flags, and keep it somewhere accessible

TAKEAWAYS:

- don’t bend the rules for new clients, it will lead to burning out & the client expecting the same allowances again
- every single person makes mistakes, but handling it maturely with accountability can build trust
- never work with someone who refuses a discovery call or to sign a contract
- no amount of money is worth broken boundaries, disrespect, and burnout
- you built a business to enjoy it, you are in control of who you choose to work with, and there is an abundance of aligned clients out there who are the perfect fit for you

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ANOTHER PLAY UNLOCKED

Guest Expert Lesson

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