

The Art of the Client Interview

By Steve Roller

It's the moment of truth: your first meeting with a big-time client.

Ace it, and your freelance writing career is off and running.

Botch it, and you're back to the drawing board, trying to figure out where your next paycheck will come from.

I remember stressing out the first five or six times I was in this situation. My mind was a whirlwind ...

What are they going to ask me? Will they want to see samples? What if they ask who else I've worked with? How do I find out what their budget is? Do they know I'm not making a living at this yet? What do I say to *them*?

The problem for me in the beginning was I needed the work more than they needed my services.

Can you relate?

Until your schedule is booked solid or you've had a few successes under your belt, you are operating from a position of need. It's tough to shake that, but I've found a solution.

Look at every client meeting as a different kind of interview. Yes, you're trying to impress the client. But more important, you're also questioning *them* to determine if they're a good match for your services.

See the difference?

It puts you in a position of strength, even if you're just starting out.

All it takes are three things to pull it off: A structured outline, practice, and a dash of confidence.

Like a good sales letter ...

If you've completed the *Accelerated Program for Six-Figure Copywriting*, you know that there's a certain architecture to an effective sales letter.



Same with interviewing clients. You can wing it and see what happens or stick to a structured framework and greatly increase your chances for landing a project.

I learned this skill from dozens of meetings with copywriting clients and thousands of one-on-one meetings when I was in direct sales.

When I talk about "meetings," I'm referring to an initial meeting with a prospective client. The purpose of the meeting from their standpoint is to see if they want to hire you. You want to see if they're a good match for your services and sell yourself, of course.

These meetings could be in person, on the phone, or by Skype. By the way, if someone ever calls you out of the blue and wants to talk in depth about your services, schedule a time to talk, even if it's only half an hour later. This process has never worked for me when the call was unexpected.

Here are the seven steps you should include every time:

1. Introductions

Thank the client for their time. If the meeting came from a referral, remind the client of that and mention how you know the person who referred you. Outline in a few sentences what you see as the objectives of the meeting.

Transition to the next section, "the lead," with a question. Something like, "Are you open to trying something slightly different to improve results?"

Tip: Don't sit back and let the client take control. Take charge in a subtle way by asking questions, being prepared with your own statements, and sticking to your plan.

2. The lead

A sales letter uses a good lead to "hook" the prospect. You need to do the same. What can you say that's different than what everyone else is saying? If the client is in your niche, use that: "I specialize in helping family-run organic farms increase sales by writing landing pages that get people to respond." That will get their attention.

This is also where you introduce a "Big Idea" or throw in a "Big Promise," the overriding benefit that you can offer the client.

You could say, "You know, the buzz these days is all about social media, which should be a big part of your strategy. But what I'm actually seeing is that marketers who combine social media marketing with direct response convert more viewers into buyers and keep them longer. I'll show you in a little bit how I can increase your customers by combining both. But first, let me ask you ... "

Tip: Don't make the mistake of jumping in yet with selling yourself. You need to cover Step 3 first.

3. Probe and listen

This is probably the most important part of the client interview and the part most freelance writers skip over.

Why is it important, and why does it often get skipped?

Asking questions, or probing, is important because it allows you to maintain control of the conversation, increasing the likelihood of you landing the project.

The more you ask, the more you find out exactly what the client needs. They'll essentially tell you what points you'll need to emphasize in Step 4.

It's easy to leave this part out if you don't prepare questions ahead of time and can't think fast enough on your feet.

I also think that listening is hard for us as writers. We like to tell people what we can do, right?

Tip: Write out a list of as many questions as you can possibly think of pertaining to the client and the project.

4. Position yourself as the solution

I call this "positioning" and not "selling" because what you're really doing is showing the client where you stand. You're not trying to be all things to all people, but letting them know what type of clients you work with and what you can do for them.

This step is easy if you've done a thorough job of probing and listening.

Keep it simple and include three things:

- Remind them of your hook or USP (Unique Selling Proposition)
- Relate a benefit you can offer to something they told you in Step 3
- Offer some proof (an example or a testimonial)

Let me give you an idea of what I mean:

"John, like I said, I specialize in helping small organic farms grow their sales. You mentioned that one of the things you'd like to do is get more people who come to your site to take action. I might be able to help you by creating a sales page that really speaks to your customers and makes an offer they can't refuse. It's similar to what I did for the XYZ Company last month. Their CEO told me that sales have been up 37% since they implemented the changes ... "

As with the other steps, the best way to transition is with a question. A simple, "Does that make sense?" can suffice.

Tip: Don't go overboard in trying to sell yourself. In fact, you may even want to say something to the effect of, "Not everyone is a good match for what I do, but if we end up working together, I think this idea would work for you, too."

5. Create the picture

We're winding down. You've showed them how you're different. You've asked a bunch of questions to find out if you're a good fit for each other. You've listened to their answers and framed your skills in terms of how you can address their needs.

Now, recap the benefits you can offer them and give them a vision of where their business can go by putting things into action.

"John, my strength is helping small businesses like yours increase their customer base and grow sales by implementing direct response marketing along with social media, without having to invest tens of thousands on an ad agency. Imagine three years from now having to increase space because you've doubled your business and moved into new markets."

Tip: Don't hesitate after this statement. Go right into ...

6. Expect a logical outcome: landing the project

What else? If you are a good fit for each other, expect that you'll be working together soon.

"My calendar is booked up for the next two weeks, but I could get started on this by the 15th. Would that be soon enough? I can send over the details in an agreement."

The more confident and naturally assumptive you are at this point, the more likely you'll have a new client.

Tip: If they hesitate or aren't sure, ask more questions. There might be details they're probably wondering about, which you can cover in the last step.

7. Let them know the next step

Take the lead here and let them know how you'd like to proceed. Don't wait for them to dictate terms to you.

If things sound good: "I'll write out a detailed agreement for you, along with two options for you to choose from. I can get that to you by next Thursday, and I'll touch base with you the following Monday. Does that work for you?"

If you still have details to iron out, or if they still have a lot of questions: "I can send out a detailed proposal of exactly what I can do for you, along with options on different pricing levels. You'll probably have questions about it, so why don't we schedule another brief phone meeting? I can call you on the 10th at 2:00 p.m. That will give you a few days to look over the proposal I'm sending. Does that work for you?"

Tip: If you've done Steps 1-6 the way I've outlined here, Step 7 is just a natural progression, and there's not much more you can do besides ask a few more questions to qualify where they are. Keep it simple and straightforward.

Increase your odds

Does this client interview structure work every time?

Not at all.

Not every client meeting will go as planned. You may not have a chance to stick to your "script" and ask all kinds of questions.

And no matter how good you are, you won't be a good match for everyone. Not everyone will think you're the solution for them either.

Use this structure, however, and you'll give yourself a better chance of gaining new clients.

Two last pieces of advice: Practice this process, and don't worry about who says yes and who says no.

Published: July 3, 2012

Related Content:

- [Turning Your Clients into Ambassadors](#)
- [If You Do a Good Job at This, No One Will Know...](#)
- [11 Tips to Help You Get New Clients Through Cold Calling](#)
- [One of the Biggest Reasons People Lose Business...](#)
- More by [Steve Roller](#)
- More from [The Writer's Life](#)

21 Responses to "The Art of the Client Interview"

Thank you for contributing this article, Steve, you have really done your homework here and it shows.

The scripted interview works but does not work overtime.

The key is to remain flexible and adaptable and change according to your situation and circumstances.

Sometimes, you can stick to the script, for the most part, but don't be rigid about it.

Sometimes, you need to go with the flow and conduct a needs analysis.

In this light, your article hit home and is right on the money.

Try to listen more than you talk. And let your client do the talking. Get as much information out of your client as possible without sounding intrusive.

Archan Mehta – over a year ago

Great as usual Steve! Turns out I'm in the midst of helping a new consulting company create their business plan & associated processes. I feel like I should mail you a consulting fee for this article! It's exactly what they need for their sales process.

Or I can buy you a beer & a dog at Target Field...

Ed in Minnesota – over a year ago

Great article Steve! I call this my "paint by numbers" approach to conducting a "positioning" meeting. I liked it so much that I bookmarked it for later reference. Thanks again!

Guest (Megan) – over a year ago

Fantastic detailed advice Steve - thanks for sharing this! Framing this as an interview really does change how the whole process feels - great idea. Think I'll need to practice these steps until they become second nature :-)

JulieW – over a year ago

Your article and comments have been THE ONLY useful information I have received so far from AWAI. I recently joined and all I have received is a bunch of e-mail trying to sell me expensive programs that I can not afford. I have been wondering: "WHERE IS THE MEAT?"

Guest (Francisco E Ochoa) – over a year ago

What a great article, Steve! Thanks so much for this organized route to impressing a prospective client while being in a new-client meeting. Those meetings can be very stressful.

It sure does feel better to be in the driver's seat by asking these questions in such a logical way than it does to be "the grillee." I'll be using this great plan from now on.

Guest (Jan Schochet) – over a year ago

@Archan - well said, and you're welcome.

@Ed - I fully intend to take you up on your offer! If not this season, then next.

@Megan - I got bookmarked! You just made my day.

@JulieW - I would suggest role-playing this before you try it with a client. The more you practice beforehand, the easier it rolls off the tongue. (I just role-played before buying my daughter a drum set on craigslist, and it saved me 10%.)

Steve Roller – over a year ago

@Francisco - Glad to be of service. Like the old Wendy's commercial, "Where's the beef?" I think you'll find as you get more from AWAI that there will be a lot of "beef." Please feel free to contact me any time if you have questions or need assistance.

@Jan - It really does turn the tables, doesn't it? Regardless of your level of experience, it positions you as more of a professional, sets the tone for future meetings, and creates a better atmosphere for an ongoing relationship.

Steve Roller – over a year ago

Steve, Here's the question I always ask at the end and I always get a great response every time I ask it.

"Is there anything I haven't asked that I should have asked?"

Even if they don't have an answer, there's something about this question that makes the client sit up and take notice.

Sean McCool – over a year ago

@Sean - Great question. I'm going to use it today at 4 PM.

Steve Roller – over a year ago

Steve:

Great article and I am a lot like you. I am a nonconformist. I really don't like the idea of someone telling me what to do, how to do it, and when.

I have written one book and sold seven copies of it back in 2005. (mainly because I did not know how to market myself and info has become obsolete now so time to update it)

I like the ideas on how to interview a client and that is another approach to use in everything else we do daily. Thanks

david-blaze – over a year ago

@david-blaze - you're welcome. Best wishes with re-purposing the book, I'm in the process of writing my first one. Hope we cross paths in person sometime.

Steve Roller – over a year ago

Thanks for your great outline of how to structure an interview. I just finished the restaurant letter and am now looking for another assignment. I'll try this on my neighbor who owns a publishing company and let you know later what happens. Confidence goes a long.....way..... when starting this journey.

WonderWorkingWords – over a year ago

@WonderWorkingWords - You're welcome. Keep me posted on how this goes with the publishing company owner, and let me know if there's anything else I can help you with. I like your username, too, by the way. :)

Steve Roller – over a year ago

This article is superb.
I have my first phone interview with a possible client in a couple days.
Looking around for ANYTHING to guide me and this is exactly what I needed.
Thank you so much.
I'm still freaking out, but now I have something to work from.
Now I just need to practice sounding calm, cool and collected.
(Sure.)

MaryAnna Rose – over a year ago

MaryAnna, glad you found this article. Let me know if there's anything else I can help you with. Best wishes with your client interview!

Steve Roller – over a year ago

MaryAnna, glad you found this article. Let me know if there's anything else I can help you with. Best wishes with your client interview!

Steve Roller – over a year ago

Thanks. Um, I do have a couple questions.

(You're so shocked right?)

How do I decide what to charge? From what I've read it's bad to charge both too much or too little.

Autoresponders is what I write, is there a page or article you can point me to?

Thanks for the encouragement.

MaryAnna Rose – over a year ago

MaryAnna,

There are a LOT of factors in pricing, and it's more art than science.

If you search the article archives here, I'm sure you'll find some articles about setting your fees.

I'd also be glad to talk to you in-depth about this sometime. You can easily find me online. :)

Look forward to connecting.

Steve Roller – over a year ago

All your advise is good but where do I find new clients. Do I just choose a web site for company X, give them a call and start with the steps you have described? Do I find them in the yellow pages? Where do I find them and what do I say if I have no previous experience. I cannot provide examples of my work. I cannot provide any references. What do I do; what do I say?

Deborah Laffoley – over a year ago

Good questions, Deborah.

What I've outlined here is once you get a prospect contacting you.

To get to that point, I'd recommend a 3-step process where you send them a direct response letter or email to start with. Then two follow-up pieces, either direct mail or email.

We're copywriters, so we should be able to write a good sales letter, right?

Don't worry if you don't have examples or testimonials.

People care more about what you're going to do for them than what you've done for others in the past.

Let me know if I can help with anything.

Best wishes.

Steve Roller – over a year ago

American Writers & Artists Institute

220 George Bush Blvd, Suite D

Delray Beach, FL 33444

(561) 278-5557 or (866) 879-2924