

# 121 - You've Just Signed a New Client - Now WTF Do You Do?

**Laura Davis:** [00:00:00] On the show today, we're giving you the exact steps we take when we take on a new client.

**Laura Moore:** You're listening to JFDI with The Two Lauras, the weekly podcast for freelance social media managers. Every week on the show, we share tips and advice to help you to grow your business and get great results for your clients. And we talk about everything from money making ideas to content strategies and everything in between.

If you're new to the show and you love it when people end up down a random rabbit hole or having an uncontrollable laughing fit, then you're in the right place. But make sure you hit that follow button in your podcast player to get all our future episodes too. On the show today, we are sharing all our secrets and guiding you through the process that we take when we get a new client.

And if you have questions about anything that we share, the very best place to get our support and get our answers is always in our membership, The Inner Hub. We'll pop the link for that in the show notes.

Okay, let's dive straight in and I want you to picture the scene, [00:01:00] Laura. You've just got a new client. They just said yes to your proposal. What is the first thing you do?

**Laura Davis:** Go “woopee”!

**Laura Moore:** Literally, I can picture you, the email comes in your inbox and you literally do that noise to yourself.

**Laura Davis:** Sounds like the Lemmings. Do you remember the Lemmings game?

**Laura Moore:** Oh my god, I used to love Lemmings! That was such a good game! Oh, is that still a thing? I bet there's an app for that.

**Laura Davis:** There is. You can play Lemmings on your phone.

**Laura Moore:** Oh, let's totally play that later when we're supposed to be doing work.

**Laura Davis:** Yeah, I don't need that kind of distraction in my life.



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**Laura Moore:** How would you celebrate though?

**Laura Davis:** It's a good question, to be honest. I probably, I think I would immediately go into, like, what do I need to do? I actually don't think I celebrate. Immediately, I think I go into, right, what do I need to do now? How do I, you know, how do I make sure that they don't change their mind?

**Laura Moore:** Yeah.

**Laura Davis:** And then I would probably celebrate [00:02:00] once I felt a bit calmer about the situation.

**Laura Moore:** Yeah.

**Laura Davis:** But I would definitely celebrate. It just possibly wouldn't be immediately. I might text my husband and go, oh, I've got a new client and he'd go, great.

**Laura Moore:** Yeah. I would totally have already spent the money. In my mind, just like I have with my lottery winnings.

Like if I was to get a new client today, I would already know what some of that first invoice would be going to buy. An Our Place Wonder Oven, by the way, in case you're wondering, in case you actually want to send me one. Yeah, I would definitely have spent the money in my mind.

**Laura Davis:** I probably would, and this isn't how I would celebrate, but I probably would like straight away go and put it in my spreadsheet of my income,

**Laura Moore:** Oh yeah, I can totally picture you doing that.

**Laura Davis:** You know, so I could see what the income was going to be that next, like when that invoice was paid, that whole month of income.

And I would definitely share it with other, like my community of like social media manager friends or ads manager friends, I would [00:03:00] definitely cut, because they get it, they get it more than my husband would get it.



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**Laura Moore:** And I love seeing posts like that. I love seeing when people get new clients and stuff and like, you know, particularly if they're like, oh, they're in this industry or they're, you know, they're going to be my biggest client or, you know, whatever it is that they're celebrating that I just find, I just love it.

It just makes me happy seeing those posts. So I can totally get why you do that. And I would totally do it too.

**Laura Davis:** Yeah. And it's never like in a, like a boastful way. It's never like-

**Laura Moore:** Yeah that's what I was going to say, sometimes I think people would think it's a bit braggy, but I don't think it is. I think it's important to notice those little steps.

**Laura Davis:** And I think sometimes it motivates other people, especially if you're feeling like, you know, will anyone, is anyone hiring at the moment? Like, I think it's easy for us to kind of go, Oh, no one's hiring at the moment. That's what, that's why I've not got clients. Whereas reality is people are always hiring.

And so it's nice sometimes to see other people's success and especially if maybe it's been a bit of a [00:04:00] journey to get to that point. You want to celebrate with people. Yeah, so I like it when people share stuff like that.

Yeah, same.

And obviously I would also have a gin and tonic at some point.

**Laura Moore:** Obviously.

**Laura Davis:** And you'd have a Diet Coke.

**Laura Moore:** I'd be sitting here with my-, I'll crack open my Diet Coke, you'd crack open your gin and tonic. Yeah, totally.

**Laura Davis:** We'd go spending.

**Laura Moore:** But on a more serious note, after we celebrated and told the world how amazing we are, and you know, in our minds spent our money, what would you do next?



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**Laura Davis:** Send my invoice.

**Laura Moore:** Yeah. And actually, like, I was, I saw a couple of posts on, um, Threads recently when we were planning this.

**Laura Davis:** Oh yeah, I saw that.

**Laura Moore:** Yeah. Um, uh, with people saying, you know, like the businesses need to start paying in advance and like, we are massive advocates, aren't we, for getting paid in advance. And I think in this day and age, there really is very little excuse for a business not being willing to pay in advance.

On your payment terms. And if your payment terms are in advance, which I think they should be, then there are always things that you can do to get paid before you do that [00:05:00] work. And I would never work unless somebody's paid me mostly because I want to go and spend the money, but also because I've been burnt so much in the past, like I've had so many times when people have been like, said they're going to pay and then they don't pay.

I'm not putting that, myself in that position anymore.

**Laura Davis:** Yeah. And, and now kind of roll on a few years when we've got this community of social media managers. We see it a lot. It is a regular problem that people aren't getting paid for the once they've done the work and it was interesting because some one of the comments was something along the lines of the large majority of businesses don't pay in advance and then in brackets, "in the UK".

So they'd obviously assumed we were like, not in the UK. And it's like, I have never, ever, ever had anyone not pay me. Like sometimes they've queried it or sometimes they've said, Oh, hang on. Because you know, of how they process their payments. Yeah. But it's just meant that I've just had to make sure I invoice a bit further in advance.

You know, so there's always been, sometimes there's been a little bit of a compromise, but without a [00:06:00] doubt, I still always get paid in advance. So it's never been a problem for me ever. No. No one's ever said no.



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**Laura Moore:** Like you just said about the compromise thing, it's a compromise in terms of, not in terms of, Oh, okay, you don't have to pay me in advance.

It's a compromise in terms of, right, tell me when I need to invoice you, what date it needs to be on, who it needs to go to. On what date so that I can get paid in advance. Exactly. Yeah. And getting all that information because if you're working with a big business that is one of these businesses that have these ridiculous payment terms and expect all of their suppliers to offer them credit, which is just insane, by the way, in my mind, if you're working with those kinds of businesses, it's not the accounts team that you need to be speaking to about that.

It's the person who's hiring you. The person who's hiring you doesn't care when you get paid, they want you to do the job. So they need to tell you all the information you need to know to give to the accounts team to get paid when you need to get paid. So you just need to push back on them and get that information.

**Laura Davis:** Yeah. Definitely. [00:07:00]

**Laura Moore:** Okay. So that's the first thing we're going to send an invoice. Hopefully to the right people, making sure we get paid in time. And I think another really important thing that we do and that everyone should do is also send a contract. I don't think anyone should be working without a contract. Agree with that?

**Laura Davis:** Oh, yeah. I'd've said that was a non negotiable.

**Laura Moore:** Okay. Good.

**Laura Davis:** Kind of in my mind, I wouldn't have even thought to have said that, because I just assume-

**Laura Moore:** Because it's just so, yeah. But it is an important part of the process and I think as well, a lot of people when they're very first starting out feel like, and especially if you're first starting out and you're taking on like a relatively small business because you're not confident enough maybe to go for a bigger business or even like a friend of a friend or whatever or a local business down the road, you might think, Oh, well, I don't, I don't need a contract.



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I'll do that next time. Well trust me on this. You do need a contract. A contract is there for so many reasons. It will make sure you get paid for a start, but it will also protect you and your business and your client. Because what if something was to go wrong and you [00:08:00] haven't got a contract that will protect you?

And that client then decides to sue you. If you've got something in your contract to protect you, then you know that you're all good. So definitely never work without a contract.

**Laura Davis:** And insurance just whilst we're on that point.

**Laura Moore:** Yeah, totally. Totally. On the note of contracts, we'll pop a link in the show notes, but we've got a whole page on our website with like, obviously we are not lawyers.

So we don't write contracts, but we have lovely friends who are lawyers and we have a website on our, a page on our website, which is [thetwolauras.com/legal](http://thetwolauras.com/legal), which is the legal shop where you can go and find templates for all of the different contracts you might need in your business.

So don't try and write this yourself. Don't go and get something free off Google.

**Laura Davis:** Yeah.

**Laura Moore:** Like make sure you have, like, this is something you need to invest in. And the good thing with buying a templated contract is that you just buy it once and you use it time and time again. So, you know, you only, you only need to worry about it once.

**Laura Davis:** Yeah.

**Laura Moore:** Then what?

**Laura Davis:** Well then, I would do nothing until those things are paid and signed.

**Laura Moore:** I like the thought of that.

**Laura Davis:** Yeah. Just sit there doing sweet [00:09:00] F. A. But I think there's this eagerness to then get going, but the problem is if you've not been paid, you're, the messages you're kind of giving off there is, Oh, well, they didn't take this seriously, or it doesn't matter if I paid me late.



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**Laura Moore:** They'll work anyway.

**Laura Davis:** Yeah, they're going to work. So then later when you're saying, look, guys, I'm not going to work because you've not paid my invoice. They'll think, yeah, we all know she will anyway. So you've got to be quite firm with yourself on that, sit on your hands and wait for payment to be made. And just make sure that when you send those invoices you're really clear, and the contract, you're clear on how long they've got really.

Because you don't want to be sat on that for weeks and months, because you could be earning money elsewhere. So you've got to be really clear, like you're expecting kind of either a media payment or something. Seven days, whatever your terms are, but don't do anything before you have money in the bank, because then you're essentially working for free and they could change their mind right up until the point [00:10:00] that that contract is signed and that invoice is paid, they could change their mind.

And if you've done a whole strategy or, you know, busy doing your competitor analysis and spending all this time. It could have just been a complete waste.

**Laura Moore:** Totally agree. Totally agree.

**Laura Davis:** So my answer is nothing. I would do nothing.

**Laura Moore:** Okay. Love it. Love it. So once we've had a little relax on the sofa, maybe we've spent a bit of our money, you know.

**Laura Davis:** Had our gin and tonic.

**Laura Moore:** Yeah, had a gin and tonic. The money's landed in our account. Then what? And they've signed the contract.

**Laura Davis:** I would then start my onboarding process.

**Laura Moore:** Is that it? Is that all you're going to tell us? I mean, this is a great podcast. Thanks for all the information.

**Laura Davis:** Yeah. So the first thing I would do then is think, right, what information do I need to get from my client to enable me to do that job and I would then have to go and ask for it, so there's.



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For example, you've got your onboarding questionnaires, which is going to ask them [00:11:00] everything. And what you want to make sure is that you really do ask them everything. Don't kind of think, oh my god, I'm asking them too much here. The most annoying thing when you work from a, your client's perspective is if every five minutes you're saying, Oh, actually, could I just ask you this? And can I just ask you that?

So you've got to make sure that your onboarding questionnaire is really thorough because you don't want to piss them off in those early days of asking them loads of questions. They'll be just thinking, Oh my God, this would have just been so much easier if we'd got someone else to do this.

**Laura Moore:** Yeah, especially if they're the sort of people who are hiring you because they want to free up time. If you keep getting them to spend time with you, like that's just annoying.

**Laura Davis:** And at that point that we're, you're talking about and the client is saying to you, yeah, okay, we want to go ahead.

You can say that this is great. Just so you're aware, this is what's going to happen. I'm going to send my invoice and I'm going to send my contract. And then once those are paid immediately after that, I will be sending you an onboarding questionnaire. I need you to invest some time in that if you want me to do a good [00:12:00] job.

So tell them in advance, you could even say to them, I will get it to you, assuming you pay me, I will get it to you by this date. Please can you block out some time in your calendar to make sure that you get this done? Because you just don't want, you don't want them to rush it and have like wishy washy answers.

You know, where they, you ask them who their audience is and they just say-

**Laura Moore:** Everyone!

**Laura Davis:** Like everyone, you know, or rich people is normally the answer. So you really want them to have time in their diary for that. And especially because. You're helping them, like by asking them and having that intense period of time where they've got to answer those questions, you're helping them in the long run.





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**Laura Moore:** Yeah, definitely, definitely. And also, like brand voice questionnaire, you want to make sure that you know, you've got all of that information so that once you have done all of the other work and you can start posting, you can actually make sure that the content sounds like them. And you don't want to leave that till further down the line and go, okay, you've done all of that, done all that, now I need you to do [00:13:00] this thing.

Okay. Do all of this at the beginning.

**Laura Davis:** Yeah. And it's not like, and that is a chunky piece of work again for them to do. And, you know, there's, there's various ways in which you can do that as well. You can send them, obviously that questionnaire, you could work through it on a call with them, um, whichever they kind of prefer, but it's so important that you get that right, because the worst thing that.

Can happen is you think, Oh, I don't want to bother them. I don't want to ask them to do this brand voice guide questionnaire. So in actual fact, what I'm going to do is just make assumptions. And then three months down the line, they say, you know what? This is a pain in the ass. We're having to approve all this.

We're having to ask you to edit things. It's just not right, it's not on brand, blah, blah, blah, you're off, you're fired.

**Laura Moore:** And also if, if, if you're not entirely sure like what a brand voice even is as we're talking about this, go and listen to episode 119 because we went into quite a lot of detail on brand voice guides in that episode.[00:14:00]

**Laura Davis:** Yeah. Okay. Nice. Yeah. That's a good idea. So after I've kind of done onboarding questionnaire, I've sent, well, sent them the onboarding questionnaire, brand voice questionnaire, I then have to, and I'll do this all as one really, again, because I've told them this is coming your way, and I'll get, then ask them for the brand kind of assets, anything they've got.

That might be a different person, I guess, within a team. So you might be sending your onboarding questionnaires to other business owner, but there might be someone more in a marketing or design team can send you some of the like brand assets that they might have, the photos, the, you know, brand colors, all of that jazz.



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**Laura Moore:** Yeah, definitely.

**Laura Davis:** And you probably want to have, depending on the type of business, you want to have a system in place to have it, you can constantly get new assets. So if it's a business that has lots of newness, you know, e-commerce. How are you going to make sure that you have access to that? So it might just be, they're going to add you to their Google drive where all their photos are, and you can just [00:15:00] find it, or that you just want to have a think about that going forward.

It's not just what you need now to get started. It's what you're going to continuously need because you will continuously need content that you'll want to have those systems in place to have a place to know where you can go to get that.

**Laura Moore:** Yeah, definitely. And also you're going to need access to all of their accounts.

So how are you going to get that access? And obviously that will depend on the platforms that you're working on. Some platforms you're going to need passwords. So you're going to need some sort of password management system, like we use LastPass, for example, and other platforms, they're going to need to add you to them, like using business manager, whatever.

So you need to know like, what do you need and what can you give that client to make sure they know how to do it and they do it properly because a lot of people don't even know how to do that. But also, even before you've taken on this client, you want to make sure that these people have access to their accounts.

The amount of times that we see people posting in groups and they've got a new client and then they're like, well, they don't actually know the login details for their Instagram or they don't know who's the admin on the [00:16:00] Facebook page. And you don't want to have those conversations at this point when you've taken a client on, you should already know that they've got that.

That should be one of your like pre qualifying kind of questions almost. If they don't have that, it's just, it's just causing so many problems. It's stopping you from getting on. It's costing you money and then money and you can't fix it.



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**Laura Davis:** The worst thing is as soon as you've had that invoice paid and you want access and they can't give you access for one of those reasons you've just said, it's automatically because they've paid you, it's then deemed your responsibility to sort it and actually in many of those situations, you know, you don't know the You know, the receptionist 25 years ago, who set up, well maybe that's an exaggeration, Facebook didn't exist then, but five years ago, he set up the Facebook page, and you don't even know who that receptionist was, who five years ago added someone to the account as admin, and then they've now gone and they're living in Barbados.

So you can't email them and say, Hey, Barbara, you know, stop [00:17:00] drinking your rum. I need you to help me. So there's, your hands are really tied. So unless there's a problem where and by you need to, maybe that there's a glitch or you need to get on Meta chat or what have you, that there's nothing you can do.

So you need to kind of make sure you find a way of getting that information before, maybe before the contract's signed, because you don't wanna have to take on that. It's such a headache. And then you would say, if there was a problem, you could say, look, I'm really happy to work with you. Happy to start.

Let me know when you've got access to your account and we can sort out the contract.

**Laura Moore:** Nice. Like that. Okay. So all's good. We've been paid. Done. We've got all the questionnaires back. We've got the brand assets. We've got access to the account. What would you do next?

**Laura Davis:** I would then do a bit of an audit on where they're at, assuming obviously it's not a brand new account.

I would, yeah, have a look at what, what kind of content's been put out before, what's worked, what hasn't worked. I'd [00:18:00] look at how, if their platforms are kind of optimized, you know, are their bios good, are their logos, not logos, what are they called? Profile pictures. Are they accurate? Is that right? Is that on brand?

Is that how we want to be showing up? So I would kind of look at all of that-

**Laura Moore:** Yep, agree.



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**Laura Davis:** Get a picture of where we're at, where the land lies.

**Laura Moore:** Yeah. Yeah. Cause obviously that's then going to like have an impact on your strategy. You're going to have a to do list of things that need changing, all of that stuff. So yeah, I would start there too.

And then, like, as I said, just kind of moving on to the strategy after that, probably, probably pretty quickly after the audit, you're going to start writing a strategy because it's the audit is going to give you. A bit of a baseline and then also the information that they've given you from that onboarding questionnaire and everything.

I think this is where a lot of social media managers, particularly at the beginning of their journeys, kind of go wrong because they miss out this strategy piece and they miss out this audit piece because they're so keen to start posting and they think, you know, the clients pay me, they've given me all this information, right, I need to start [00:19:00] posting.

I'll do an audit once I've done some content or I'll write a strategy whilst after I've done the content and then the content isn't going to work because you haven't done that immediate, you know, that initial piece of work. And I think this is why when you're kind of putting a proposal together and what have you, it's so important to give, a client, a timeline.

So they know what's going to happen. They know that you're not going to start posting straight away because they know you need to do the audit. You need to write the strategy. They need to give you all the information and what have you, and you're not going to start posting on their socials on day one of them having just paid your invoice.

**Laura Davis:** No. And I think setting that boundary is, is so important. The amount of clients I'd say the large majority of clients that I've taken on would have assumed I would be posting on day one.

**Laura Moore:** Yeah. Same. Yeah. I would say the same for mine. If I hadn't obviously set those boundaries before.

**Laura Davis:** Yeah. They just don't understand.



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And even if that you're working for a large company, they've already got maybe a social media strategy. You would still need time to go through [00:20:00] that and maybe change it or make recommendations or you'd still need time to do that audit to check that you're happy with the account as they are at that point.

It's never going to be on that first day you post. So it's important to kind of set that expectation.

**Laura Moore:** I can totally understand why a business might be frustrated by that. And now I think, well, hang on, but I've paid you, what are you doing? Because you can't see what's going on behind the scenes, can you?

You can't, you know, so I think that's why it's so important to have those conversations and make sure they really understand that and make sure they understand the importance of auditing their accounts and the importance of that strategy and, you know, delivering it to them.

**Laura Davis:** Yeah. That should be in your proposal.

There should be a timeline of what happens next. But if you've got The Social Media Managers' Toolkit, that's definitely within the proposal template that we use and all the toolkit owners use. So you have to be really clear on those expectations. And people will say, and we do get asked this a lot, like how soon after taking [00:21:00] on a client should I be saying that I'll be posting?

And it's really difficult to say. Like they, you know, if you've got no other client. And you have, you know, the time of full time hours a week, you could bash out loads of this, assuming obviously they do their side and get you all the information you need. You could bash out all of this fairly quickly and be posting by the second week, if not before.

But if you're someone who's already got loads of clients, you can only kind of dedicate a certain amount of time. You know, a day, a week or something to this, it may take you three or four weeks. So it's, it's very difficult to give people an answer on this because we're all different. We all worked at different speeds.

We all like probably different elements more than the others. So some of them would love, like the strategy, but hate doing like, kind of like the audit bit. So you, you're gonna be



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slower on the bits that you don't like. You know, there's all of that. Our time is, available is different, how quickly the clients get back information, some of them will get it back to you [00:22:00] the next day, others will take weeks, you know, so it's, there's lots of variables in that, and so, and there isn't a right or wrong, obviously I think you'd be taking the piss if you said, Oh, I'm not going to be posting for three months, so you obviously have to be realistic, but as long as you can set out and say, This is what I will be doing when I first start working you X, Y, Z, therefore your first post I'm hoping will be blah, blah, but I would always over-, over?

**Laura Moore:** Under promise, over deliver.

**Laura Davis:** Under promise, over deliver.

**Laura Moore:** Another saying you can't get right, nice.

**Laura Davis:** Because I would then say, well, I'll be posting, I'll start posting for you on Monday the blah, blah, and then like a few days later, earlier than that I'll work out a post, make it a good one.

**Laura Moore:** Nice.

**Laura Davis:** And that will keep them happy.

**Laura Moore:** Love it. So to recap then, what we're going to do when we take on a new client. First, we're going to have a little celebration. A little party. Let everyone [00:23:00] know.

**Laura Davis:** Woop woop. Woopee!

**Laura Moore:** Yep. And also I think like, sometimes it's a good thing to put on your socials that you're taking on a new client. Like that's good social proof. Get paid in advance.

Make sure that you get a contract signed as well in advance of you doing any work. Those two things are really, really important. Don't forget, we said that there is a legal template shop on our website. Go to [thetwolauras.com/legal](http://thetwolauras.com/legal) for that. And then you're going to set up and send your onboarding pack, which will include your onboarding questionnaire,



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your brand voice questionnaire, information about assets you need, information about how they're going to add you to their accounts.

And then you're going to start off with an audit, write your strategy and eventually start posting.

**Laura Davis:** So if you're listening to all of this and thinking, okay, yeah, I can do all this. Yeah. Brilliant. But I don't know what to put in an onboarding questionnaire, or I don't know what to include in a strategy, or I've never done a proposal before.

And I don't know how to set out a timeline and you're panicking stuff right there. You don't need to panic. All of this is included in The Social Media Managers' Toolkit. [00:24:00] All the templates, it includes everything, everything you need to work your way through this system. So you're nice and slick, the client thinks you've got your shit together, like, it's all in there.

So you can just go to [thetwolauras.com/toolkit](http://thetwolauras.com/toolkit) and come and ask us any questions if you want to know anything else about the toolkit.

**Laura Moore:** Yeah, and we'll make sure that the link for that is in the show notes as well, just below where you're listening. If you do have any other questions and you are in the membership, then obviously come and ask us anything in there and we will be back.

Same time, same place, next week.

**Laura Davis:** Yeah-ha.

**Laura Moore:** Maybe celebrating a new client. We'll let you know.

**Laura Davis:** Woohoo!

**Laura Moore:** Woohoo! Have fun! Au revoir!

**Laura Davis:** Woopee!

**Laura Moore:** Woopee!

