# Business - Ensuring Your Business is Strong Before You See The New Client

By Dr. Linda Hancock

## ABOUT THE AUTHOR

Dr. Hancock has written a regular weekly column entitled “All Psyched Up” for newspapers in two Canadian provinces for more than a dozen years. Over the years, her readers and clients have said that they have benefited from her common-sense solutions, wisdom, and sense of humour. Dr. Linda Hancock, the author of “Life is An Adventure…every step of the way” and “Open for Business Success” is a Registered Psychologist who has a private practice in Medicine Hat. She can be reached at 403-529-6877 or through email office@drlindahancock.com

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As a solo professional you will likely not be paid until you actually meet with the client. There are several things that you need to do in order to ensure that the first meeting happens.

1. Offer a friendly and professional first impression. Many clients decide whether they will meet with you based on their initial contact with your office.

2. Ensure the client is a good match - You will need a brief understanding of their problem in order to determine if you are competent to help that person.

3. Clearly inform the client about things that you will not do for them - If they are asking you to do things that are outside your mandate or ethical boundaries, it is important that s/he knows that before the first appointment.

4. Give directions to your office - When a client is lost or late for an appointment it may affect not only your first appointment, but also your future relationship. Give a clear description of how to arrive at your office and landmarks which will help the person to find it.

5. Determine how and when your fees will be paid. It is easier for both of you to discuss this before the first appointment so that necessary calls for insurance approval or other arrangements can be made.

6. Obtain necessary consents and other paperwork. if you are seeing children, for example, you will need to have signatures of informed consent from both parents. Paperwork from referral sources can also be requested and received before the first appointment.

7. Follow up on appointments that are cancelled. If the client decided not to attend because of something you can correct in the future, it is important that you know that so you can make an adjustment for future growth. On the other hand, most people cancel their appointments because of personal issues. Your follow up call may be exactly what they need!

8. Complete your administrative process. Prepare a file and enter your information into your accounting system. You will not only be more organized, but also have less stress knowing that everything is in order so that you can spend the least amount of time during the appointment on these tasks.

If you take extra care at the beginning of a business relationship, you will earn the respect of your client and eliminate problems that may interfere with getting off to a good start with them. Just think about how your would like to be treated and then offer that quality service to your client.