

# Client Checklist

**Be organized! Your clients will love you for it!**

1) ***As quickly as possible*** acknowledge the booking via email or by returning their phone call. And say thank you for choosing me as your talent!

2) Would you like to schedule a directed session? If so, via: Skype, ISDN, ipDTL, Source Connect or Source Connect Now? (Whichever apply to what you offer). Then move forward by asking a time that works best for ***them***. Of course you have a schedule of your own to consider, but it's courteous to start with their needs. Always share times you are **available**, not times you are NOT available. Clients don't want to hear about when you are taking your dog to the groomer, picking up the kids from school, or when you have doctor's appts, etc... Just tell them when you're **available** because that's what they want to know! **\*And also clarify your time zone and theirs.**

3) Or, would you like me to record on my own, and deliver tracks? If so, what type of file format do you prefer? mp3, wav, or aiff?

4) When is your deadline for this project? Always deliver tracks on time or before this deadline! So many projects are time sensitive, so always follow through. If a client needs a project delivered and you can foresee you might struggle with meeting that deadline, ask for more time. Better to address it right away, than to not be able to follow through!

5) Are there timings I need to be aware of for your project? For example is this a 2 minute narration project? Or, are these :60 second spots? It's crucial to know if projects are timed or if timing doesn't apply.

6) Who would you like me to deliver files to? Get email addresses. When you deliver files include a sentence saying, please let me know you received this! The last thing you want is your project floating around in cyber space!

7) Lastly, confirm rate and billing information. Once the project is delivered, you'll want to know where to send an invoice.

8) Your client will most likely get back to you in a day or two thanking you of a job well done, or possibly needing a revision or two. This is a great time to

thank them again, and tell them you look forward to working with them again soon. If they need revisions, acknowledge you'll get on them right away, and get them back as soon as you can.

### **Additional things you can do to shine!**

~Send multiple takes. Everyone appreciates options.

~Deliver the project ahead of schedule. If their deadline is 3 days from now, and you deliver tomorrow they'll be very pleased! (Just don't rush through the project to be speedy).

~Be thorough with quality check the final project. About 30 minutes or so after completing voicing and editing go back and review your work while reading along. I recommend waiting a shortage before review... You'll more easily catch mistakes with some time in between.

~During your live session, address your client by name, be friendly, listen carefully to direction. And always say thanks at the conclusion of your session!

### **Example of an email confirming their needs/requests, and creating an agreement/understanding with them:**

Hi Bob,

Thanks again for selecting me as your talent for the Clorox project! I look forward to voicing this for you.

Just confirming you need an mp3 file delivered to your email address by tomorrow, 3/25/15 EOD Pacific time. These tracks need to be under :60. And I'll be sending my invoice to Shirley at: [accounting@so&soproductions.com](mailto:accounting@so&soproductions.com).

If this all looks correct, please give me the green light, and I'll get started right away!

Thanks again,  
Your name.

**If you're confirming a recording session:**

Hi Bob,

Thanks again for selecting me as your talent for the Clorox project! I look forward to voicing this for you.

Just confirming our ISDN session tomorrow 3/25/15 at 3pm Pacific time. My dial ups are:

1) 888-555-1212

2) 888-555-1213

I'll send my invoice to Shirley at: [accounting@so&soproductions.com](mailto:accounting@so&soproductions.com).

If this all looks correct, please confirm! I look forward to our session tomorrow!

Thanks again,  
Your name.