

A Day in the Life of a Consultant

Highlighting experiences in the tree consulting world

The Prospective Client Litany

By James Komen, RCA #555

I get lots of incoming phone calls. Some turn into clients. Many do not. I want to sell my services, and at the same time, I want to be sure to conform with the Standards of Professional Practice. I want to build rapport with my prospective clients, but I also don't want to waste time on a lemon.

Many prospective clients have simple issues that can be handled by less-expensive alternatives. Rather than try to sell my services to them, I try to point them in the direction of information that might be a better fit. I find that offering alternatives before providing information about the cost of my services helps show that I am making a good faith and genuine attempt to help my prospective clients.

Over time, I have developed a litany for handling incoming phone calls from prospective clients. I take a position of extreme candor. My strategy is to provide ample information upfront. I find that it serves as a very effective filter so that the prospective clients who end up hiring me are the highest quality.

What follows is my litany for a typical caller asking for me to diagnose their tree ailment. Don't believe me? Try it out sometime. Give me a call and see what happens: 818-495-5344.

[Company name], this is *[my name]* speaking. How can I help?

Prospective client explains question or query.

Ask questions to clarify, if necessary. When the scope of the query is clear, briefly recapitulate it.

Did I roughly summarize what you are asking for?

If "No," clarify and recapitulate again. If "Yes," but I am not able to accept the assignment, politely decline.

Otherwise, proceed.

Yes, I believe I can help you with that. However, I am not your least expensive option. In the interest of fairness, I am going to provide you a couple of alternatives you might consider before you decide to spend money on my services. Let me know when you're ready to take a few notes.

Wait for caller to search for a pen and paper.

First, the *[local arboretum or university extension service]* provides free advice over the phone if you send photos. I usually recommend my prospective clients try them first. Your tax dollars pay their salaries, and they interface with the public to answer questions just like this. You can contact them at *[phone number]*. The advantage is they're totally free. The disadvantage is they don't come out

to the property.

If you need someone to come out to the property, another good resource is the American Society of Consulting Arborists, or ASCA. There you are looking for someone with an RCA Credential, a Registered Consulting Arborist. There are lots of members, but fewer RCAs. You'll see me. You'll see my colleagues. Many of my colleagues charge less than me.

If you would still like for me to make a site visit, I would be happy to do so. I charge *[site visit fee]* for the first hour of a site visit and *[hourly rate]* for any additional time on site or report writing after that. I encourage you to look at all of your available options before you decide to engage my services.

If prospective client would still like to hire me, then accept assignment and proceed to scheduling.

If prospective client expresses concerns regarding cost, then:

Before you make a decision to hire anybody, I encourage you to reach out to *[local arboretum or university extension service]*. They're a great place to start, and they're free. Worst case, you've wasted a 5-minute phone call. After you've tried them, you can try talking with some of my other colleagues. Anyone with an

Prospective Client Litany *continued*

RCA credential would be a good fit. And if after you've made a few calls, you still want to hire me, I would be happy to help. But if you're able to get what you need from a less expensive alternative, then I encourage you to do what's best for you.

Politely conclude the call.

I'm here if you need me.

This litany has been very effective in accomplishing a number of things:

- *Build Trust:* I offer my prospective clients alternatives that provide no financial benefit to me. When I offer these alternatives, I build trust. Why would I be telling them about a potentially better alternative that doesn't benefit me unless I was genuinely trying to help? Those who have ultimately decided to hire me have told me that offering alternatives helped them trust me. They didn't see me as a salesperson trying to close a deal.

- *Filter Out Freebie Seekers:* Some callers just want free advice. These callers can end up eating up a great deal of time asking their "quick question." Often callers will ask if they can send photos so I can "just take a look." Providing the "free" option is usually a great way to end the phone call quickly, while still leaving the caller feeling good. Providing a service where callers can send photos for free implies that I don't offer free "quick looks." Once I started including the local arboretum in my litany, I have been getting far fewer callers asking for freebies.

- *Assist Price Comparison Shoppers:* Similarly, some prospective clients are shopping around for the lowest price. There's no point in wasting

time on them when I don't try to compete on price. If there is no difference in the utility of my services and the utility of the services of one of my less-expensive colleagues, then the prospective client shouldn't hire me. On the other hand, by suggesting that callers reach out to an RCA, I help narrow the field of professionals that they use as the basis of comparison. That way, they won't be comparing apples (licensed contractor) to oranges (RCA, BMCA, etc...).

direction of a free or less-expensive

alternative that adheres to arboricultural standards, I reduce the likelihood that callers will resort to tree-hackers for their arboricultural advice.

I acknowledge that my litany errs on the side of over-disclosure, and this results in some lost opportunities. But in my view, the opportunity cost of any forgone consulting work is far less than the benefits that I gain. 🌿

- *Promote ASCA and the RCA Credential:* Many of my callers come from non-ASCA sources such as Yelp or a referral directory. My litany helps raise awareness of our organization and its flagship credential one caller at a time. Even if I am not the RCA who gets hired for a particular job, I still benefit indirectly when the general public learns to ask for RCAs.

- *Promote Good Tree Care:* Even if I am not hired to provide consulting advice, I still want my callers to make good tree care management decisions. By pointing them in the

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