

CONSULTANTS · FREE STARTER KIT

First Client Call Kit

An intake form, discovery questions and a first-meeting checklist.

Why the first call matters

The first call decides whether you are seen as an order-taker or as a trusted advisor. Clients do not hire the consultant who talks the most; they hire the one who understands their problem better than they can explain it. This kit gives you three tools: an intake form that does the homework for you, a question framework, and a checklist so nothing is forgotten.

How to use the kit

- 1 Before: send the intake form**
Send it when the client books the call. Add your logo and name. Ask for it back 24 hours before the call.
- 2 Prepare with the checklist**
Use page 2 of the file. Fifteen minutes of preparation changes the whole conversation.
- 3 Run the call with the 5-block framework**
See the next page. You talk 30% of the time; they talk 70%.
- 4 Recap the same day**
The recap email (below) proves you listened and secures the next step.

■ The 5-block question framework (45 minutes)

Block	Minutes	Questions to choose from
1 · Situation	8	"Walk me through how this works today." · "Who is involved?" · "What tools do you use?" · "How long has it been this way?"
2 · Problem	10	"What is the hardest part?" · "Tell me about the last time this went wrong." · "What have you already tried and why did it not work?"
3 · Impact	8	"What does this cost you each month, in time or money?" · "What happens if nothing changes in 6 months?" · "Who else is affected?"
4 · Success	9	"If we met in 90 days and you were happy, what would have happened?" · "How will you know it worked?" · "What would be a good first win?"
5 · Constraints	10	"Who needs to approve this?" · "What budget range feels comfortable?" · "When do you need results?" · "Anything that would stop this from happening?"

Listening tip: After each answer, wait two seconds before speaking. Then use: "Tell me more about that." The best insight usually comes after the first answer.

■ Red flags to note

- Nobody can say what success looks like.
- The person on the call cannot decide and will not introduce the decision-maker.
- The budget and the expectations are far apart.
- They want "everything, now".

The same-day recap email

Recap email template

Send within a few hours of the call.

Subject: Recap and next step

Hi [Name],

Thank you for your time today. Here is what I understood:

- Situation: [1 line]
- Main problem: [1 line]
- Impact: [number or example]
- Success in 90 days: [1 line]

Next step: I will send [proposal / options] by [date]. If I missed anything, reply here and I will adjust.

[Your name]

Use AI to prepare and follow up

PROMPT 1 · PREPARE

"Here is a client intake form and their website text: [paste]. Summarize the business in 5 lines, list 3 hypotheses about their real problem, and suggest 8 sharp follow-up questions I should ask."

PROMPT 2 · ORGANIZE MY NOTES

"Turn my call notes into: situation, problem, impact, success criteria, constraints, open questions and next steps. Do not add anything I did not write: [notes]."

PROMPT 3 · RECAP EMAIL

"Using these organized notes, write a recap email in a warm, professional tone, under 150 words, ending with one clear next step: [notes]."

Client confidentiality: Tell clients if you use AI tools to prepare, and never paste confidential information without their permission. Remove names and sensitive numbers first.

Next step: Turn the call into a project with the **Proposal & SOW Pack**, **Client Onboarding** and **Client Workspace**. See the Consultants bundle (15% off) at gelka.co/templates.