

On Your Terms Podcast Episode 20:

5 Ways to Avoid Difficult Clients (Stop Legal Problems Before They Start!)

Sam Vander Wielen: [00:00:10] Hey there and welcome back to another episode of On Your Terms. I'm your host, Sam Vander Wielen, an attorney turned entrepreneur who helps online coaches, course creators, and service providers legally protect and grow their online businesses using my DIY legal templates and my Ultimate Bundle Program.

Sam Vander Wielen: [00:00:26] And man, oh man, have I been through my fair share of problem clients, problem customers, whether they actually became customers or I prevented it before it even started, which is more the situation now and more like I can keep these people away as much as humanly possible. But I feel like I have learned so much about dealing with problem clients that I just want to make sure I'm passing this on to you.

Sam Vander Wielen: [00:00:52] Because problem clients are the clients who become legal problems. They become legal headaches. It doesn't tend to be random people who, you know, bought your product and they loved it. They don't end up suing you or they don't end up asking for their money back. That's not the issue. It's always the client here like, "I knew this person was going to be a problem." That's the person who ends up being the legal headache.

Sam Vander Wielen: [00:01:13] And so, as you are taking all of the steps that you need to learn how to legally protect your business, to register it properly, to get business insurance, to make sure your financial stuff is in order. I want to make sure you're actually doing some of the more invisible work behind the scenes to make sure that we're not working with people in the first place who could prevent or who could cause a problem. If we can prevent it, then that's always the best option.

Sam Vander Wielen: [00:01:40] Now, of course, we can't prevent everything. We don't have a crystal ball, as far as I'm aware of. If anyone has one for online business, let me know. But I don't have one. And so, people have still slipped through the cracks. It happens. It's okay. People are also people and we have quirks. We have bad days. We go through rough times.

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Sam Vander Wielen: [00:02:01] You know, I know that when my dad first got sick, I would find myself like popping off on somebody and saying something and being like, "Sorry. I'm in a really bad mood." And so, I am very understanding. I'm empathetic to a fault.

Sam Vander Wielen: [00:02:15] And so, I don't say anything in this episode today with judgment or, like, these are bad people. It's just about business. It's just about doing what's best for you as a business person. It's about making your business as profitable as possible. And making this process as enjoyable as possible. I want you to love what you do. I want you to love who you work with. I want you to be excited to get inside of your Facebook community, or your membership, or to answer customer's questions. And I want you to, overall, enjoy what you're doing. I really feel like that's the point of being an entrepreneur, it's just getting to have some fun with this stuff.

Sam Vander Wielen: [00:02:55] So, before I hop into this episode, you'll hear me in this episode at the end share about a brand new freebie that I've got for you, which I am so excited about. I pulled the audience and, overwhelmingly, people were super excited about this option. And so, I have a brand new freebie for you, it's called Pre-Qualify Before They Buy.

Sam Vander Wielen: [00:03:14] It gives you three email templates plus a walkthrough video training with me on how to legally pre-qualify and prep potential clients to stay within your scope of practice before getting on a sales or discovery call. So that, hopefully, we can avoid wasting any of your time with these clients who, either never intended on working with you in the first place or just intended on barging right on through all those boundaries you're working hard to set. So, you'll find the link below. You'll also hear me share more about this incredible three email template series, how I use it in my own business, how I used it, and how it actually skyrocketed sales and conversions for me back when I did host free calls.

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Sam Vander Wielen: [00:03:53] So, enjoy this episode. I can't wait to hear what you think. As always, your feedback is appreciated. With that, let's get into this week's episode on how to avoid difficult clients.

Sam Vander Wielen: [00:04:09] So, I've talked about this issue of working with difficult clients a little bit in the past on Episode 5 of On Your Terms. But that episode was a little bit more focused on what to do when you're already working with somebody, and that client turns into a pain in the neck and how do you legally get out of it. Because there are a lot of important issues around already working with someone trying to cancel a contract, do you give them your money back, all of those kinds of things. So, if you're looking for that type of advice, I would definitely go back to Episode 5 or also listen to Episode 5.

Sam Vander Wielen: [00:04:39] But today, in this episode, we're really focused on prevention. I'm all about prevention in general as much as we can. So, today, we're talking about five very concrete ways that you can try to prevent the wrong kinds of clients from signing up to work with you in the first place, from buying your products if they're automated, to even booking a call.

Sam Vander Wielen: [00:05:02] Because for a lot of you, if you're an online coach, even a consultant, a service provider of some sort, free calls are some way of connecting with you. It might be a big part of your business and it can also be a huge time suck. And time sucks are money sucks. And so, it's really, really important that we talk over this issue and we're making sure that you're not wasting any of your time or as little as possible with this.

Sam Vander Wielen: [00:05:25] Of course, this is not a foolproof method. People slip through the cracks, people change. Sometimes we just have to roll with it. But I think that a lot of the things that we're going to talk about today will help weed out the biggest issues in your business. So, I know that it can be tempting to want to work with everyone, or anyone, or just be like, "If anybody bought my thing, I would be happy."

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Sam Vander Wielen: [00:05:50] I remember feeling like that, like, five years ago. And just feeling like I was in no place or I had no business, you know, trying to limit who could purchase my products because not that many people had purchased them five years ago. So, it's just getting started.

Sam Vander Wielen: [00:06:04] And I also understand, too, that there's a lot of messaging to you about all this just getting started messaging about you just need something, you just have to get started. That's not always true. And I think after today's episode, you'll realize why. But it really isn't worth it because it will actually end up hurting your business. This attitude of I just need to work with anyone, I'm in no position to be turning anything away, can actually hurt you. It can actually cost you more money.

Sam Vander Wielen: [00:06:34] Here are a couple of ways. So, difficult clients, more than anything, any other people, become lawsuit clients. So, people come to me all the time asking me, "How do I prevent lawsuits? How do I do this? I want to make sure I don't get sued. I'm so nervous, blah blah blah." And everybody thinks it's about having more concrete legal pieces in place, like having the right contract, having the right website policy, having all these things. That is true, and you need that in case the difficult client goes haywire.

Sam Vander Wielen: [00:07:02] But the issue is the client in the first place. It tends to be the client in the first place. And a lot of times those things could have been prevented from just not having worked with that person. And I assure you, it is not worth the money or anything like that, not only because the literal time you're going to put into it into working with this person and then having to clean up afterwards when it turns into a disaster. But it is not going to be worth it because that energy could have been spent elsewhere in your business and you would have made much more in the long run.

Sam Vander Wielen: [00:07:36] So, those difficult clients become lawsuit clients, that's really important to understand. I think more on an energetic level, those clients also become energy vampires. They're going to suck the life out of you even if they don't sue you. They're going to be the people who are constantly making you jump through

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hoops, people who are never happy, people who are making you run around to accommodate them in different ways.

Sam Vander Wielen: [00:08:00] And you really do have to see this in your business. It's hard to see it when you're in it, you know, if you're behind the scenes and you're changing admin staff, you're changing the way that someone can pay for something, and you're changing the onboarding, and you're changing the packaging and the contract, and all the things just because of them. You might not think it at the time, but if you step back, you really do have to realize that that is money. That time that you're spending is throwing money into the fire. So, it is not profitable for you to deal with people in this way. It's a profit drain because you're wasting time and resources.

Sam Vander Wielen: [00:08:38] And when you're an online coach or you're course creator or you're service provider of some sort, your time is everything. So, it's super important that you take this seriously.

Sam Vander Wielen: [00:08:49] I also just think it can throw you off your game. I mean, this is how I used to feel about, like, reading nasty comments or something usually on the Facebook ads. I don't know why, but the keyboard warriors are always much braver through Facebook ads than anything else. But, you know, I think just protecting your energy as much as possible and not allowing this kind of stuff to throw you off your game.

Sam Vander Wielen: [00:09:11] Because then, what I ended up seeing happen was that, like in my case, I would see a bad comment. But in your case, you might have a nasty client or somebody get on a discovery call with you and they're a jerk or something like this. It then, first of all, puts you in a bad mood, but it also makes you approach good clients in a more skeptical and hesitant way. And we don't want that. We don't want you to start, you know, not trusting everybody just because we got this one jerk in the door.

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Sam Vander Wielen: [00:09:38] I think the other thing is that it doesn't exactly, like, pump you up and motivate you to get out there and create content, and to have energy, and to have some sort of magnetism about you to draw people in to want to work with you if you're constantly in a bad mood.

Sam Vander Wielen: [00:09:52] You know, I've been thinking about this a lot lately when I see people, and it actually is now influenced my behavior, but I would see people on Instagram sharing about some client experience being like this person's a jerk, this person does this, this person does that, they ask for this. And I thought to myself, first of all, I don't want to talk about clients or people that way on social media, even when it's anonymous.

Sam Vander Wielen: [00:10:15] Second of all, just the energy that you expand on that, think about where else that could go. Not just in your business, but your life, right? But if we're talking business stuff, the amount of time it took you to film an Instagram Story about how this client was a pain in the ass could have been spent on a educational piece of content that would have brought in five new leads. So, we're talking about one pain in the ass who you're going to end up refunding anyway when we could have been talking to all these people who are there and excited to hear from you.

Sam Vander Wielen: [00:10:47] So, I think it can be a drag. I think it can, like, shift the energy of your content, of your account, you know, all kinds of things. So, it's something just to be aware of. But we have to be responsible for ourselves and say, "Well, I'm giving this person all this time and attention," or, "I have certain holes in my business where I'm allowing these people to come in." So, that's really what I'm focusing on today is helping you to close those holes, close those gaps, not allowing these people to seep through the cracks and get into your business so that we're not getting thrown off our game.

Sam Vander Wielen: [00:11:18] So, I want business to be as fun as possible. Of course, there are ugly parts of business. Of course, there are more stressful things. There are stressful days and months and weeks and all those kinds of things. But I think

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that the point of starting your own business was probably so that you can enjoy or at least better enjoy what you do, have flexibility, have freedom, all those things. But, also, so that you could have some fun.

Sam Vander Wielen: [00:11:41] You know, my friend, Sammy, always says, like, "If we wanted things to be miserable, we could just go back to being lawyers because her and I were both lawyers." So, you know, we have to remember like, "That's why we're here. We're here to have fun and to make this fun." And again, not to say that that means it's fun all the time, but overall, right?

Sam Vander Wielen: [00:11:58] So, one of my customers was telling me the other day - she had the Ultimate Bundle - that she could see this person who turned out to be a problem client coming from a mile away. And I just wanted to use this as an example as we go through the five tips today that I'm going to share with you as to how you can see how this could have been prevented and saved her headache and time and money.

Sam Vander Wielen: [00:12:20] So, she really felt in her gut that this person was a pain. The person, before they started working with her, had already asked for special payment arrangements. I don't mean a discount, which is a whole another issue, but more like, "Well, I know you take credit card and PayPal, but I want to pay this way." Or, "I know you have eight payments of 289, but I want nine payments of 263." I don't know. I'm just making up numbers. So, it was this really highly customized requests.

Sam Vander Wielen: [00:12:52] And then, she asked to also accommodate and to change the package that was being offered. She couldn't take it as is. Everybody else who signs up to work with this person takes the package that this person offers. And then, this person that we were talking about, she was like, "Well, that's great that you offered this package, but I want it this way." And she had a number of other different requests that were just a little frustrating.

Sam Vander Wielen: [00:13:16] But my customer was just feeling like, "Who am I to say no to this? I need to build my business. I don't deserve to protect my energy or my

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business. I need the money," which is understandable. But she didn't want to say no. So, she went through all of the hoops. She ignored her intuition only for this person, this pain in the butt client, to stop working with her early anyway. Like, she asked for this special package, this special number of calls, a special period of time for her package. She stopped it early and stopped paying, even though she had signed the contract saying that she would.

Sam Vander Wielen: [00:13:54] So, it's really frustrating because you see how you can go through all this stuff anyway, thinking that you're helping, thinking this person just has a couple of requests and I'm just helping, and who am I to turn this down or turn this away? And you go through all that, only for it to not work anyway.

Sam Vander Wielen: [00:14:11] I've also heard the same story from different people where it ended up that the person actually asked for all of their money back. So, you just went through that same scenario only to not get anything out of it. It's huge. So, we really want to take this part of our businesses seriously.

Sam Vander Wielen: [00:14:28] So, let's go over the five ways that you can avoid difficult clients in your business. And I am so excited because I've got something for you, a link in the description below that will give you one of these for free so you can just implement it right away. I wanted to create this resource for you so that you don't have to waste any time in your business putting this together. It will take you a couple of minutes. It's free download for you. I'll explain in a little bit, but I'm very excited for you.

Sam Vander Wielen: [00:14:56] So, tip number one of how you want to avoid difficult clients is to gatekeep. So, when we gatekeep, we want to make it that it's not so easy for people to talk to us or work with us. So, there's kind of two phases to this. So, if you offer free calls, then I want you to think about gatekeeping as it applies to getting on those calls with you, because that is a huge amount of time that's dedicated in your business. And it should be that it's pretty high level access to you, even if you think your business is pretty small.

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Sam Vander Wielen: [00:15:33] So, we want you to not be super available and we want there to be a couple checkpoints before people get there. So, this could look like, first of all, not just having a straight up link to book a free call with you on your site. I think that's a great starting point. That was something I changed back in the day when I offered free calls. And I used to just have this approach that it was like, "Gosh. If anybody wants to get on the phone with me, that'd be great."

Sam Vander Wielen: [00:16:01] And it was cool for, like, marketing purposes and all that kind of stuff. But it was bad in terms of time and profitability, and a lot of those calls were wasted. Some people don't even show up, which is also a waste of time because you're holding the time and the space for them.

Sam Vander Wielen: [00:16:15] So, we want to make it not super easy for these people to book the call in terms of just having a direct link. It doesn't tend to work super well in terms of conversion anyway. But you want to have it be that, first of all, you have copy on this page. So, if there's a work with me page or learn more about working with me page, we want to have a specific copy, like who this is for, who it's not for. Do some pre-qualifying there, have some language. And then, I would have it be more like an application process. This doesn't have to be really long.

Sam Vander Wielen: [00:16:47] I feel like when you say application, it sounds really intense, but it could be more like a form, something like that, where they have to answer a couple of questions. They have to say what they're looking for, what they're hoping to even get out of the call. You might ask about budget at this point. Ask them if they have a budget to spend on a certain project. Or letting them know, "Hey, my packages range between X and Z. Is that within your budget," something like that.

Sam Vander Wielen: [00:17:11] Some people will ask, "Is there anyone else who needs to be present in order to make this decision?" So, now, I tend to send people from my team to calls instead of me attending the first call. I'll only get on after we've already had a first call with somebody if we're hiring a contractor or an agency or something. So, they will typically ask, like, "Is there somebody else who we need

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permission from?" That would be me. So, that would be really helpful to have on your application.

Sam Vander Wielen: [00:17:37] As well as just some, I think, pre-qualifying questions as it relates to your work. So, making sure that this person is actually looking for what you offer and that you're the right person for them based on what they're looking for. And you'll know best, obviously, what some of those questions are, but there might be some questions you can use that would knock out something because of scope of practice. There might be something that would knock you out because of kind of work that you like to do. Or maybe somebody is looking for a diet help and you're an anti-diet person. So, it depends what you do, obviously. But I think you can think of probably a few questions that would further whittle down whether or not somebody is a good fit to work with you based on what they're looking for and what you offer.

Sam Vander Wielen: [00:18:23] I also think that in this application, you could ask them to review some things. So, like, if you had some sort of PDF - I know some of my friends have a PDF that describes a bit more about their services in their package - you could let people review that ahead of time. You could share some client feedback to say like, "Does this sound like what you're looking for?" I think any of these little micro-hoops that you can have somebody go through, when we're talking about free calls, you're going to end up speaking with somebody who is more on target and actually looking for your services.

Sam Vander Wielen: [00:18:58] In other words, we're really in this first step looking to speak to people who are actually wanting to get on the phone with you because they're interested in working with you and not because they're interested in (A) picking your brain or (B) just having like a free call. It's not like a sample call, right? I think a lot of people misunderstand or mischaracterize discovery call, sales calls, whatever you want to call it, as a sample call. Like, "I get in this call and I get to see what it's like to be coached by her."

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Sam Vander Wielen: [00:19:28] I remember when I had 20 minute legal checkup calls and when people would get on these calls with me, they would literally start off the call - which is what prompted me to create the system that I'm talking with you about today - and be like, "I'm just so excited that I get free 20 minutes to ask a lawyer all my questions." And so, I would barely even get started at the beginning of the call. As I went on, I had a little routine where I would introduce myself, and then I had a series of questions. I would set kind of the boundaries, the terms of the call, and then I would have a lead off question.

Sam Vander Wielen: [00:20:01] And sometimes I would get on these calls and the person who would be like, "I'm just so excited. I get this 20 minutes to pick a lawyer's brain." I would be like, "Okay. I have 100 questions for you so let me get started." And then, they would just - boom - launch off into all of their questions. And it was just funny for me that's what caused me to create the system that I'm teaching today because it was a really reflective moment for me to realize, "Wow. I really haven't done the work to help them to understand what this call is really for, what this call is really about, what we're going to cover, what I'm not going to cover, because I'm not there to give them free 20 minutes of legal advice."

Sam Vander Wielen: [00:20:35] First of all, I don't give legal advice, so that would be outside my scope. Which would be a good example of what you might do, hopefully, you're not giving nutrition advice or career advice, therapy advice, or whatever on these calls or just in general, because you might not be able to do that. So, it's like, "That's a problem." But then, the other thing is like, "That's not the point of the call. The point of the call is to decide whether or not my product or my program was right for you. And if you needed any sort of clarifying questions as to which one do I need, why do I need this one, I don't understand, " that kind of stuff.

Sam Vander Wielen: [00:21:06] So, it's really good for you to start taking note of what some of the people might be saying in their call or in their emails to you, and that will help you to decide which parts of this process that you really need to tighten up. And I'm

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going to have something for you, number five, that's going to do this for you for free so I'm excited to share that with you.

Sam Vander Wielen: [00:21:29] Have you ever gotten on a sales call with a potential client and walked away from it disappointed that they weren't respecting your boundaries, weren't honoring your scope of practice, or that they had the wrong idea about what it is that you actually do in your business? You know, the ones like it tend to get real cozy in the Zoom meeting, and then start to challenge your scope of practice, ask for coaching advice on the discovery call - which is a legal no-no, that could land you in legal hot water. Or they just booked the call so they can just pick your brain without ever picking up their wallet.

Sam Vander Wielen: [00:22:01] I call them scope pushers because they like to push the boundaries of what you'll do for them. And these people usually win awards for a client least likely to pay you on time, or client most likely to sue you should they ever encounter a problem with you, or the client most likely to sign up for a three month package only one month in to say, "Thanks. I got what I need. Please cancel those remaining payments."

Sam Vander Wielen: [00:22:23] Here's the deal, I've helped thousands of entrepreneurs, coaches, and service providers just like you to avoid the wrong clients and only attract the amazing ones who pay on time, refer you to their friends, and respect your scope of practice, not to mention your office hours. I want to help you do the same thing, and that's why I created a totally free email template pack and video walkthrough called Pre-Qualify Before They Buy, which includes three attorney written email templates, plus a video training to pre-qualify your discovery calls for better customers.

Sam Vander Wielen: [00:22:52] One, to copy and paste the pre-qualify before they buy email templates and fire them off to potential clients. You'll get those scope pushing Freebie Hunter's vanishing from your Calendly links before ever meeting with them

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virtually - phew - which means that you get to see it to future legal problems before they ever even happen.

Sam Vander Wielen: [00:23:09] So, if that sounds like a slice of heaven that you need, then head straight to the link in the description. That's samvanderwielen.com/prequalify-oyt to get your free copy of the email templates and video walkthrough right now. That's samvanderwielen.com/prequalify-oyt to get your free copy right now so you can start enjoying stress-free discovery calls with ideal clients right away.

Sam Vander Wielen: [00:23:38] Number two, the second way to help avoid difficult clients is to trust your intuition, and I know that that sounds very simple, very basic advice. But I do think that so often when I hear stories, I get so many emails and DMs and things from people in the throes of, like, a bad client situation, I don't know the last time that someone hasn't mentioned something like, "I knew this was going to happen." And then, I'll typically ask a few questions about why, like, "Why were you feeling that way?"

Sam Vander Wielen: [00:24:11] And it's typically around what I was talking about earlier in this episode. They were asking me to jump through hoops. They were not being respectful. They were doing all these things. So, they knew that this was going to be a bad fit. They got a vibe from them. Maybe they even got on the call. They did all the pre-qualifying that I was talking about. But then, they get on the call and they got a bad feeling from the person on the call. They got a feeling like this person wasn't really looking for what they offer. They got a feeling like this person wanted to start a business of their own, and that's why they were kind of just trying to sample of how somebody else was doing this. I've heard that one a lot.

Sam Vander Wielen: [00:24:44] So, you want to pay attention to these gut checks that you're getting. I think you're getting them for a reason. And more often than not, you will be safer by going with that intuitive feeling that you are getting.

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Sam Vander Wielen: [00:24:58] The third way that you can avoid difficult clients is by paying attention to the special requests that you're getting from these people. So, when we're talking about how to spot these people or how to prevent them, we have to learn how to spot them. So, we have to know how to spot these potentially bad clients.

Sam Vander Wielen: [00:25:17] And I always give the disclaimer when I talk about this, first of all, everyone is entitled to their moments. Maybe the person have a bad day. They snipped off an email. I'm not suggesting that you go around cutting everybody off, firing all these clients, or not letting anyone work with you unless they're the perfect or unicorn client. That's not what I'm talking about.

Sam Vander Wielen: [00:25:39] But paired with this intuitive feeling, some of the things I'm about to talk about might hit home for you. So, when people ask you to twist yourself into a pretzel, that's when I see it being a problem, in general. So, usually, this looks like having a lot of requests to overly accommodate this person. That might mean offering something unique to them that you don't offer. It's kind of like asking somebody, "Do you want chocolate or vanilla ice cream?" And they're like, "I want you to go make me strawberry. I want you to go outside, grow some strawberries, milk a cow, and then make me some strawberry ice cream." You're like, "That wasn't even part of the deal. Like, how did we get to strawberry ice cream?" That's kind of how I feel about this.

Sam Vander Wielen: [00:26:23] Sometimes I feel like you have these products, it's like product line or product two. And they're like, "I'll take seven." It just doesn't make any sense. And sometimes that can be because people need something different. And sometimes it can be because people are a pain in the butt and they just need to be difficult and they need to have something different. They need to like, "I need to control this situation. I need to control which product I'm getting," essentially.

Sam Vander Wielen: [00:26:49] I see it all the time with people contacting me to say, "Thanks for offering the Ultimate Bundle, but here are the ten that I want you to package for me instead." And it's just like, "Sure. You can go buy all ten a la carte. The whole point is that I have this product. Now, of course, it's smart of you as a business person

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that if enough people are requesting this or something like that, you take a step back, and maybe this is an idea for a new product or a different product. Or if people are consistently saying something or consistently requesting something, that's a different story.

Sam Vander Wielen: [00:27:21] I'm just talking about you kind of already have a system that works. These packages have been tried. The products have been tried. Things are working. People are happy. And then, this person is asking for the strawberry ice cream. That's all I'm talking about. And now I really want strawberry ice cream just as a side note, maybe later.

Sam Vander Wielen: [00:27:39] I think another thing that you have to be aware of when we're learning how to spot potentially difficult clients is when people ask you to go outside your scope of practice or are not respecting your scope of practice, even from the get-go.

Sam Vander Wielen: [00:27:54] So, I distinctly remember getting very pissed in a free call that I had a million years ago, like four or five years ago, and it was with two women who were starting a business. You know, I did my whole little spiel at the beginning about how I'm a lawyer, but I'm not your lawyer. Even if you buy things from me and I sell digital products and templates, I don't offer legal advice, I don't do any legal services.

Sam Vander Wielen: [00:28:18] They were like, "That's great. We have some questions for you. So, this is what we were doing, blah blah blah, blah blah. And so, like, should we do X or Z?" And it was like, "Wait. I just told you." So, I was like, "Okay. So, that's a good example of where I can't offer you advice because especially when it comes to scope of practice, whether it's legal advice, financial, medical advice."

Sam Vander Wielen: [00:28:38] One of the biggest no-no's is making a game time decision for someone. Like, calling a shot saying, "You should do A or B." That is an example of being outside of scope of practice, because that's something where you

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really have to take in a lot of information. And as the expert, the person is looking to you to tell them what to do. And that's kind of a little red flag in your mind when you know you're outside of scope.

Sam Vander Wielen: [00:29:05] And so, I reminded them like, "Hey, this is an example, I can't do that, blah blah blah." They were like, "That's great. But if you could just tell us is it A or B?" And I'm like, "Yeah. Exactly. I can't tell you whether or not to do that." And it just kept going on and on and on like that. It was really frustrating. I was definitely losing my patience. No matter how many times I set the boundary, they were being very disrespectful. And so, I ended the call. I said, "Please don't purchase my product. We're not a good fit. You're not understanding what I do. It sounds like you need a lawyer. Good luck with your business. Have a nice day." And I ended the call.

Sam Vander Wielen: [00:29:43] So, I think it's really important that when people are showing me that upfront, I was just imagining, I was playing the tape in my mind six months down the line thinking, "Oh, my goodness. Could you imagine if that person was in my product? And every time something kept coming up for them, they would be like, 'I need advice on this. I need advice on this.'" If they're not respecting my boundaries now, it's not going to get any better, typically speaking.

Sam Vander Wielen: [00:30:08] I do see that sometimes clients need to be trained a little bit. That people mean well. Sometimes they don't even understand that what they're asking is outside of your scope of practice. So, it really is very nuance and it takes, I think, a lot of just practice and exposure on your end as the business owner.

Sam Vander Wielen: [00:30:27] Because when I started out, I thought everybody was doing it on purpose. They were purposefully being disrespectful or purposefully trying to go outside my boundaries and not listening to me. But the further I've gone on in business, I've realized sometimes people just don't know. Sometimes they don't know what your scope is. They don't understand maybe even what their question is. Or they don't understand that the answer that would be required to properly answer their question would be outside of my scope of practice. So, sometimes they just don't get it.

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Sam Vander Wielen: [00:30:55] And I think then in those cases, it is about you just saying friendly and politely like, "Hey, this is an example of how I can't unfortunately answer that for you, because that would be outside of my scope of practice. I'd be happy to offer you some more information or this resource," or give them a link. Or say, "This would be a great question for your doctor, lawyer, accountant, therapist, whatever it is." So, I think you have to learn how to handle these. And I know it's probably annoying to hear that answer of like, "It's not always so cut and dry, but I think it is how it goes in online business."

Sam Vander Wielen: [00:31:31] So, in general, though, I think we want to avoid those client situations where maybe a few of these elements are stacking up. You're also having your spidey senses up about this. Like, this is already not feeling good. There's already something a little wrong. Maybe you just got a bad vibe on the call combined with asking things outside your scope or combined with asking you to twist yourself into a pretzel, that might be a good time to pull the plug.

Sam Vander Wielen: [00:32:00] Now, I just thought of something because often people will say to me, "What do you tell somebody on the phone? Like, if you're on the phone or if they send you an email, how do you say it? How do you tell them we're not a good fit?" So, I think it depends on what happens. But you could say something along the lines like, "I'm so glad that we got to chat today. It was really nice meeting you. After hearing a little bit more about what you're looking for, I don't actually think my program would be that helpful to you." So, I typically would pitch it as it being, like, not that helpful or beneficial to them.

Sam Vander Wielen: [00:32:33] Versus, you obviously don't want to say, "Thanks for contacting me. I don't want to work with you." That might be the subtext that you have in the back of your mind. But, personally, that's just not what I put in an email. So, it would be more like, "Thanks for contacting me but it's not the right fit." Or, "It sounds like what you're really looking for is financial advice. I think you should contact a certified financial

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planner." If you have some references or resources, you could give that to them. That's always a good thing.

Sam Vander Wielen: [00:33:03] I mean, you could also just say like, "Thanks for contacting me. I'm actually booked at this time. I'm unable to take on any additional clients." I mean, there are all kinds of things that kind of depends on the situation and what you want to say, but that's personally how I'd handle it. I just remembered somebody asked me that the other day in another training.

Sam Vander Wielen: [00:33:20] So, if you want to learn more about the scope of practice issues, like what somebody might be asking you to do that's outside of your scope, what even is your scope of practice, how do you figure that out, I just wanted to encourage you to go back and listen to Episode 2 of On Your Terms, because that's where I did a deep dive all about scope of practice for online coaches and service providers. So, that's where you go for that.

Sam Vander Wielen: [00:33:41] Now, the fourth way that we prevent or try to avoid difficult clients from working with us, buying our products, or signing up for our calls, is to "interview" them. So, in our pre-qualifying process, we are asking them questions that might comb through some of the common issues in our field. So, you could even do this in your free call itself when you're talking with them. That free call is just as much about you getting to figure out if this is a good fit for you as the coach or the service provider, as it is for them to learn more about you and decide if they want to hire you or pay you money.

Sam Vander Wielen: [00:34:21] So, I just want you to get in the habit of protecting yourself and understanding that this is just as much for you, and to make sure that this is a good fit for you. And I can remember distinctly when you're still in that mode of "I would just be happy for somebody to sign up to work with me or to buy my product." That we can forget that. We can kind of forget that we are also there to figure out if this whole situation is good for us.

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Sam Vander Wielen: [00:34:50] So, I want you to work on interviewing them just as much, whether that means that you ask them questions about budget, about time, like their availability and time. Typically, my clients have to spend two hours a week doing this or we have calls once a week and then it's about an hour of implementation time on your own. With everything you've got going on, is that something that works for you right now? Because sometimes that can be a problem down the line where people cancel their card because they say, "Oh, it ended up being I didn't have time to do all this stuff." So, that's something where you can ask them ahead of time.

Sam Vander Wielen: [00:35:31] You can also, I think, get to the root of whether people are, like, self-starters, self implementers, go getters. People who, if they don't know the answer, they go out looking for it instead of just coming to you for everything. I mean, it kind of depends on what you do. And if you have courses, if you teach something about business, I could see this being really, really helpful.

Sam Vander Wielen: [00:35:49] I know a lot of my friends who are more in the business space have implemented more questions around the kind of person that you are. Especially as a business owner of like, "Are you the person who gets knocked off the horse a million times and is rolling around in the mud, but can keep getting back up?" "Cool. Then, you're my person." Because that's what entrepreneurship can be like.

Sam Vander Wielen: [00:36:13] But if you're the kind of person who needs a lot of hand-holding or is really looking for a course or some instruction on how to do everything and not learning how to take this information and implement it yourself, it's just not the right fit. So, I think there are a lot of questions that you could ask in that interview process.

Sam Vander Wielen: [00:36:33] All right. Drum roll, please. Last but not least, and this is the one I'm so excited to gift you something. This is something I asked about, I asked my audience a while back. I gave you three options, actually, and this was one of them. And, overwhelmingly, this was the number one option of something that you said would be really helpful for you in your business.

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Sam Vander Wielen: [00:36:53] So, number five is all about warming them up and weaving them out. So, the way that I always did this and I created this on my own and then I would ask other people, like, "Do you guys do this?" And no one else was doing this. So, I'm really excited because I'm going to gift my little system to you.

Sam Vander Wielen: [00:37:11] But the way that I think was the most impactful in preventing difficult clients and especially avoiding a waste of free discovery calls with people who either didn't show up, didn't respect my boundaries, never plan to sign up to work with me anyway, or even had that as a possibility in their mind, was to have this little pre-qualifying process go on and be automated through a series of emails that the person would receive once they signed up for a free call with me.

Sam Vander Wielen: [00:37:41] So, it doesn't have to be this amount, but I think three emails is a kind of a nice amount of emails that somebody should get. So, essentially, once somebody actually books a call with you, you set up a little email automation sequence. Meaning, they automatically get these emails and you're not manually having to send them. And you can do that through things like ConvertKit, which I have a link for below even for the free plan. Now, they have a free plan or a free trial, I have that too.

Sam Vander Wielen: [00:38:07] But you could set that up in there. You can set this up in Calendly. You can set this up probably through like MailChimp and every other major email service provider. But, essentially, the idea behind this email automation sequence - which I am literally giving you the email templates to in the link below - is to warm them up and show them the door if the door is the right place for them to go.

Sam Vander Wielen: [00:38:31] So, the idea behind these three emails that somebody would automatically receive after they sign up for a call with you is, first, to confirm the call and establish yourself. Kind of get to know this person. Say, "This is who I am. Here's a little bit about me." Maybe you send them to your main content driver. I might send somebody to the podcast and say you should go over and listen to my podcast episodes, or go watch my YouTube channel, or something like that, or follow me on

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Instagram. And so, you might send somebody there. And then, we start talking about the call.

Sam Vander Wielen: [00:39:03] So, we start talking about the call. We teach them what the call is about and what it is not about. And then, by setting that boundary now, we can get them to use the door if it turns out that it wasn't what they were looking for. So, I was terrified to implement this strategy because I thought, I'm going to set this whole thing up, and then I'm literally encouraging people to leave if it's not the right fit for them. And so, isn't everybody just going to drop out? And it was incredible what ended up happening instead.

Sam Vander Wielen: [00:39:32] So, I stopped having all of these annoying phone calls of people saying, "I'm just so excited to be able to talk to a lawyer for free for 20 minutes." Those went out the door. And, in fact, sales and conversions from those calls skyrocketed, skyrocketed. Because what happened was that by the time people got to the call with me, they were prepped. They were warmed up. They were ready to go. They understood what the call was about.

Sam Vander Wielen: [00:39:58] I even included information about the product, which I'm going to teach you in my freebie below how to even warm them up and get them familiarized with whatever products you have or the product, maybe, specifically that they signed up to talk to you about. I'm going to teach you in this freebie below exactly how to do this with somebody so that the people that you get on the call with or at least potentially interested in working with you.

Sam Vander Wielen: [00:40:23] Of course, not everybody. It wasn't a requirement. Like, it's not like if you sign up for a call with me, you must buy. It's just that I wanted to get on the phone with people who were at least open to that idea and not the opposite. Not like, "I'm just doing this and I would never buy from her."

Sam Vander Wielen: [00:40:38] You guys, I'm not kidding. I had people sign up for my free call, like many, not just one, who would literally get on the phone with me and tell

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me that they bought legal templates from a "competitor." But that person didn't provide any customer service, and they had a couple of questions for me about the template. And I was like, "Are you serious?"

Sam Vander Wielen: [00:40:58] Sometimes I used to be so caught off guard with these things. I didn't even know what to say. I was like, "Yeah. So, you should try contacting that person. I'm sorry that you purchased from someone that has no customer service. I have a lot of customer service, which would have been the reason why you should have come here. But I can't help you. I'm not the customer service representative." I had people set up calls asking me questions about LegalZoom saying they had purchased something from LegalZoom and wanted my help understanding how to implement it. I was like, "Call LegalZoom. That's crazy."

Sam Vander Wielen: [00:41:26] So, that was my fault, though. That wasn't their fault. Why didn't I have something set up? Why was it so easy to book this call with me? So, I implemented all the things that we're talking about today as well as this three part email sequence, which I am now gifting to you for free. And it completely revolutionized my free calls to being really more like sales calls.

Sam Vander Wielen: [00:41:48] Really being more like, "Did you have a couple of questions about the product, about how it works, whether it's right for you, to some of the logistics?" Like, just wanted to meet me, get a good feel, no problem. I'm happy to do that. But I'm not here to pick my brain. And I'm definitely not here to answer questions about competitor's products because they don't offer customer service.

Sam Vander Wielen: [00:42:06] So, I hope that that's been helpful. I'm really excited for you to download my brand new freebie. It's called Pre-Qualify Before They Buy. It's three email templates plus video trainings on those templates teaching you how to legally pre-qualify and prep potential clients to stay within your scope of practice before a discovery or sales call so you don't waste any of your time with a not so great potentially problem client, who tries to barge right through your business boundaries.

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Sam Vander Wielen: [00:42:34] So, I dropped the link below to buy Pre-Qualify Before They Buy, a new freebie. I am so excited to share it with you. Of course, let me know if you have any questions. I can't wait to hear what you thought about this episode. Send me a DM on Instagram @samvanderwielen on Instagram. And, of course, I would love it if you followed and subscribe to my podcast, On Your Terms. Let your friends know about it who are in online business if they need to hear this kind of stuff, too. But I still appreciate you listening to this week's episode of On Your Terms. I'll see you next week.

Sam Vander Wielen: [00:43:08] Thanks so much for listening to the On Your Terms podcast. Make sure to follow on Apple Podcasts, Spotify, or wherever you like to listen to podcasts. You can also check out all of our podcast episodes, show notes, links, and more at samvanderwielen.com/podcast. You can learn more about legally protecting your business and take my free legal workshop, Five Steps to Legally Protect and Grow Your Online Business at samvanderwielen.com. And to stay connected and follow along, follow me on Instagram @samvanderwielen and send me a DM to say hi.