

GabeDA First Client Meetings - Launch Checklist

Your Step-by-Step Action Plan

PHASE 1: PREPARATION (Do This Week)

Materials to Create/Print

- ☐ **One-Page Pitch** (print 20 copies)
 - Color or black & white? (Color better but more expensive)
 - Include your photo? (Builds trust in small town)
 - Print on good quality paper
- ☐ **Sample Report** (print 10 copies)
 - Use anonymized fictional business
 - Make it relevant to Villarrica (restaurant or retail example)
 - Highlight the 3-5 insights section prominently
- ☐ **Data Processing Agreement** (print 5 copies)
 - Fill in your information (RUT, address, contact)
 - Have blank client sections ready
 - Consider having a lawyer review (optional but recommended)
- ☐ **Business Cards** (print 100)
 - Name, title, phone, email, website (if you have one)
 - Keep it simple and professional
 - Consider QR code to online calendar for easy booking
- ☐ **Quick Reference Card** (print 2 copies)
 - Print double-sided
 - Laminate if possible (lasts longer)
 - Keep one in pocket, one in car

Digital Assets

- ☐ **Email Signature**

Gabriel [Apellido] GabeDA | Decisiones Inteligentes para Tu Negocio 📞 [Teléfono] | 📧 [Email] 📅 Agenda una consulta gratis: [Calendar Link]
- ☐ **WhatsApp Business Profile**
 - Business name: GabeDA
 - Description: Análisis de datos para PYMEs en Villarrica

- Business hours
- Location
- Website (if you have one)
- ☐ **Simple Website or Landing Page** (Optional but helpful)
 - What you do (1 paragraph)
 - How it works (3 steps)
 - Pricing
 - Contact form or calendar
 - Can use: Wix, Squarespace, or even Google Sites (free)
- ☐ **Online Calendar** (Highly Recommended)
 - Calendly (free tier) or similar
 - Set up "30-min Free Consultation" slots
 - Include in email signature and marketing

Practice & Preparation

- ☐ **Rehearse Your Pitch** (5 times minimum)
 - 15-second version
 - 1-minute version
 - 5-minute version with sample report
 - Record yourself on phone - watch it - improve
- ☐ **Prepare 3 Industry Examples**
 - Restaurant/Café insight example
 - Retail/Tienda insight example
 - Service business insight example
 - Memorize the numbers and story
- ☐ **Objection Handling Practice**
 - Write out top 5 objections
 - Practice responses out loud
 - Have a friend role-play with you
- ☐ **Study Your Sample Report**
 - Know every number in it
 - Understand every insight
 - Be able to explain any part immediately
 - Anticipate questions about methodology

PHASE 2: IDENTIFY TARGETS (Next 3 Days)

Target Business Criteria

Ideal First Clients:

- ☒ 2-5 years in operation (not brand new, not ancient)
- ☒ 5-20 employees (complex enough to need insights)
- ☒ Uses some system (POS, Excel, Nubox)
- ☒ Owner/manager accessible
- ☒ Visible business (you can walk in)
- ☒ Tourism-dependent or retail (data-rich industries)

Avoid for First Clients:

- ☒ Brand new startups (no historical data)
- ☒ Very small 1-person operations (limited data)
- ☒ Franchises (decisions made at corporate level)
- ☒ Very traditional/old businesses (resistant to change)

Create Your Target List

Make a spreadsheet with 30 businesses:

| Business Name | Type | Location | Owner/Manager | Contact | Priority | Notes | | Example Rest.
| Restaurant | Calle X | María | 555-1234 | HIGH | Tourist-focused |

Priority Levels:

- **HIGH:** Know someone there, clear need, good fit
- **MEDIUM:** Good fit, don't know anyone yet
- **LOW:** Backup options

Ways to Build Your List

☐ **Walk Villarrica Centro** (2-3 hours)

- Note every business
- Take photos of storefronts (for memory)
- Observe: do they look busy? Professional? Data-aware?

☐ **Online Research**

- Google Maps: businesses in Villarrica
- Facebook: local business pages
- Instagram: Villarrica hashtags
- Local business directories

☐ **Ask Your Network**

- Friends/family in Villarrica
- Former colleagues
- Social media connections
- Community groups

PHASE 3: INITIAL OUTREACH (This Week)

Warm Outreach (Start Here)

☐ **Personal Connections First**

- Anyone you know who owns/manages a business?
- Friends of friends?
- Former classmates?
- Family connections?

Message Template (WhatsApp/Text): Hola [Name]! Soy Gabriel [Apellido], [how you know them].

Estoy empezando un proyecto ayudando a negocios locales en Villarrica a tomar mejores decisiones con sus datos. Dado tu experiencia con [their business], me gustaría conversar 30 minutos para entender tus desafíos y mostrarte lo que estoy haciendo.

¿Tienes tiempo esta semana o la próxima para un café?

Cold Outreach (After Warm)

Option A: Walk-In (Best for Retail/Restaurants)

Script for Walk-In: Buenos días, mi nombre es Gabriel. Estoy trabajando con negocios locales aquí en Villarrica ayudándoles a entender mejor sus datos y tomar mejores decisiones.

¿Podría hablar con el dueño o encargado por 2 minutos?

[When you meet them] No quiero quitarte mucho tiempo ahora - sé que estás ocupado.
¿Podría dejarte mi información y coordinar 30 minutos esta semana para mostrarte algunos ejemplos de insights que podría generar para un negocio como el tuyo?

[Leave one-pager + business card]

Best Times for Walk-Ins:

- Restaurants: 10:30-11:30am or 3:00-4:30pm (between rush hours)
- Retail: Weekday mornings (not weekend when busy)
- Services: By appointment (call first)

Option B: Email Outreach

Subject: Insights de datos para [Type of Business] en Villarrica

Estimado/a [Name],

Mi nombre es Gabriel [Apellido] y estoy trabajando con PYMEs en Villarrica para ayudarles a tomar mejores decisiones con sus datos.

Con mi experiencia de 10 años en análisis de datos en Experian, he visto cómo acceso a insights correctos puede transformar negocios - y quiero traer esa capacidad a negocios locales.

Por ejemplo, recientemente ayudé a un [similar business type] a descubrir que [specific insight example relevant to their industry] - un hallazgo que aumentó su margen en 15%.

Me gustaría ofrecerte 30 minutos sin costo para:

- Entender tus desafíos actuales
- Mostrarte ejemplos de insights relevantes para [their business type]
- Ver si tiene sentido trabajar juntos

¿Tienes disponibilidad esta semana o la próxima?

Puedes responder a este email o agendar **Directly** aquí: [Calendar link]

Saludos, Gabriel [Apellido] GabeDA | Decisiones Inteligentes para Tu Negocio [Phone] | [Email]

Option C: LinkedIn (If Applicable)

Connection Request Message: Hola [Name], vi que administras [Business] en Villarrica. Estoy ayudando a negocios locales con análisis de datos y me gustaría conectar.

Follow-up After Connection: [Use email template above]

Social Media Outreach

☐ **Create GabeDA Social Presence**

- Facebook Business Page
- Instagram Business Account
- LinkedIn Profile/Page

☐ **Initial Content** (Post 1-2x per week)

- "Did you know..." stat about local PYMEs
- Simple tip about business data
- Case study/example (anonymized)
- Behind-the-scenes of analysis
- **Call to action:** "Consulta gratis - link in bio"

Content Ideas:

- "3 señales de que estás perdiendo dinero sin darte cuenta"
- "¿Sabes cuál de tus productos realmente te da margen?"
- "Por qué tu contador te dice 'qué pasó' pero no 'qué hacer'"

PHASE 4: FIRST MEETINGS (Week 1-2)

Goal: Book 10 Initial Consultations

☐ **Track Your Outreach**

- Contacted: ____
- Responses: ____

- Meetings booked: ____
- Meetings completed: ____

Preparation Checklist (Before Each Meeting)

24 Hours Before:

- ☐ Research the business (15 min)
- ☐ Prepare 2-3 relevant examples for their industry
- ☐ Review quick reference card
- ☐ Confirm meeting time/location

2 Hours Before:

- ☐ Review your pitch
- ☐ Check you have all materials
- ☐ Dress appropriately
- ☐ Eat something (low blood sugar = bad pitch)

30 Minutes Before:

- ☐ Arrive at location
- ☐ Find parking
- ☐ Turn off phone notifications
- ☐ Deep breath - confidence check
- ☐ Review their business notes

After Each Meeting

☐ Immediate (in car/before leaving):

- Write down key points
- Note promised follow-ups
- Record objections
- Gut feeling: will they convert?

☐ Within 24 Hours:

- Send follow-up email/WhatsApp
- Attach promised materials
- Propose specific next step
- Calendar reminder for follow-up

☐ Update Tracking:

- Meeting outcome (Hot/Warm/Cold/No)
- Next step scheduled? (Y/N)
- Probability of closing (0-100%)
- Lessons learned

PHASE 5: FOLLOWING UP (Ongoing)

Follow-Up Schedule

Hot Leads (Very Interested):

- Day 1: Thank you + materials
- Day 3: Check if they reviewed materials
- Day 7: "Ready to move forward?" + specific date to start
- Day 14: Final push or move to "Warm"

Warm Leads (Interested but Hesitant):

- Day 1: Thank you + materials
- Week 2: "Pensaste más en esto?" + new insight example
- Week 4: Case study or testimonial (when you have one)
- Week 8: "Cualquier novedad?" + stay in touch
- Month 3: "¿Buen momento ahora?"

Cold Leads (Not Right Now):

- Day 1: Thank you for time
- Month 3: Check-in: "¿Ha cambiado algo?"
- Month 6: Share success story
- Month 12: Annual check-in

CRM (Customer Relationship Management)

Simple Options:

- **Google Sheets:** Free, simple, works
- **Trello:** Free, visual, good for pipeline
- **HubSpot Free:** More powerful, still free
- **NotionTemplate:** Free, customizable

Minimum to Track:

- Contact info
- Meeting date
- Status (Hot/Warm/Cold/Client)
- Next action
- Notes

PHASE 6: FIRST CLIENT ONBOARDING (When You Close Deal #1)

Celebration First! 🎉

- ☐ You did it! First client!
- ☐ Tell someone who supported you
- ☐ Take a moment to be proud

Immediate Next Steps

☐ **Sign Data Processing Agreement**

- Both parties sign
- Give client a copy
- Keep original in secure place

☐ **Collect First Payment**

- Invoice immediately
- Track payment date
- Set up monthly recurring if possible

☐ **Schedule Onboarding Call (30-45 min)**

- Show them how to export data
- Understand their current systems
- Set expectations
- Answer any questions

☐ **Set Calendar Reminders**

- Data request date (e.g., 1st of month)
- Analysis completion deadline (e.g., 20th)
- Report delivery date (e.g., 25th)
- Monthly consultation call (e.g., 28th)

First Month Execution

☐ **Week 1: Data Collection**

- Client sends data
- You validate it
- Request clarifications if needed
- Confirm data received

☐ **Week 2-3: Analysis**

- DO THE WORK (this is why they hired you!)
- Find meaningful insights
- Prepare recommendations
- Create professional report

☐ **Week 4: Delivery**

- Send report PDF
- Schedule 30-min call
- Walk through findings
- Answer questions
- Delete raw data (7 days max)

☐ **Follow-Up**

- Email: "¿Implementaste alguno de los insights?"

- Track if they actually use your recommendations
- Adjust next month's analysis based on feedback

SUCCESS METRICS TO TRACK

Weekly Metrics

- ☐ Businesses contacted: ____
- ☐ Meetings booked: ____
- ☐ Meetings completed: ____
- ☐ Hot leads: ____
- ☐ Proposals sent: ____

Monthly Metrics

- ☐ Clients closed: ____
- ☐ Revenue: CLP ____
- ☐ Pipeline value: CLP ____
- ☐ Conversion rate: ____%
- ☐ Average deal size: CLP ____

After 3 Months

- ☐ Total clients: ____ (Goal: 3-5)
- ☐ MRR (Monthly Recurring Revenue): CLP ____
- ☐ Client retention: ____% (Goal: 100% in early days)
- ☐ Referrals received: ____
- ☐ Time per client: ____ hours/month

COMMON EARLY MISTAKES TO AVOID

Don't:

- **✗ Offer too much for free:** Your time has value
- **✗ Discount too heavily:** Devalues your service
- **✗ Take clients you know you can't help:** Hurts reputation
- **✗ Promise specific results:** You can't guarantee business outcomes
- **✗ Ignore small businesses:** They might be your best advocates
- **✗ Get discouraged after rejections:** It's a numbers game
- **✗ Forget to follow up:** Most sales happen in follow-up
- **✗ Neglect existing clients for new ones:** Retention > acquisition

Do:

- **✓ Charge your worth:** You have 10 years of expertise
- **✓ Be selective:** Better to have 3 great clients than 10 mediocre ones
- **✓ Over-deliver on first clients:** They're your case studies

- ☒ **Ask for feedback:** "¿Cómo puedo hacer esto más útil?"
- ☒ **Request referrals:** "¿Conoces otro negocio que podría beneficiarse?"
- ☒ **Document everything:** Every insight, every meeting, every win
- ☒ **Be patient:** Building trust takes time in small communities
- ☒ **Stay learning:** Each client teaches you something

YOUR FIRST 30 DAYS ROADMAP

Week 1: Preparation

- ☐ Create all materials
- ☐ Practice pitch 10+ times
- ☐ Identify 30 target businesses
- ☐ Set up digital presence

Week 2: Outreach

- ☐ Contact 20+ businesses (warm + cold)
- ☐ Book 5+ initial consultations
- ☐ Follow up on all outreach
- ☐ Refine pitch based on responses

Week 3: Meetings

- ☐ Complete 5+ first meetings
- ☐ Send follow-ups within 24h
- ☐ Book next steps with hot leads
- ☐ Continue outreach to new targets

Week 4: Closing

- ☐ Send proposals to hot leads
- ☐ Handle objections
- ☐ Close first 1-2 clients (GOAL!)
- ☐ Start onboarding process
- ☐ Plan next month

FINAL REMINDERS

You Have What It Takes

- 10 years at Experian
- Deep expertise in data analysis
- Understanding of business challenges
- Commitment to your community
- Unique value proposition

Success Factors

1. **Consistency:** Show up every day
2. **Patience:** Building takes time
3. **Value:** Always put client needs first
4. **Learning:** Adapt based on feedback
5. **Belief:** You're solving real problems

When You Feel Discouraged

- Review why you started
- Remember your experience
- Look at one success (even small)
- Reach out to support network
- Take a break, then keep going

ACTION PLAN SUMMARY

This Week:

1. Print all materials
2. Practice pitch 10 times
3. List 30 target businesses
4. Make first 10 contacts

Next Week: 5. Book 5 meetings 6. Complete first meetings 7. Send follow-ups 8. Refine approach

Week 3-4: 9. More meetings 10. Close first client 11. Deliver amazing first analysis 12. Ask for referral

You've got this! Villarrica's PYMEs need what you're offering. Now go make it happen.



Print this checklist and check off items as you complete them. Update it based on what you learn. This is your living document for the first critical weeks of GabeDA.