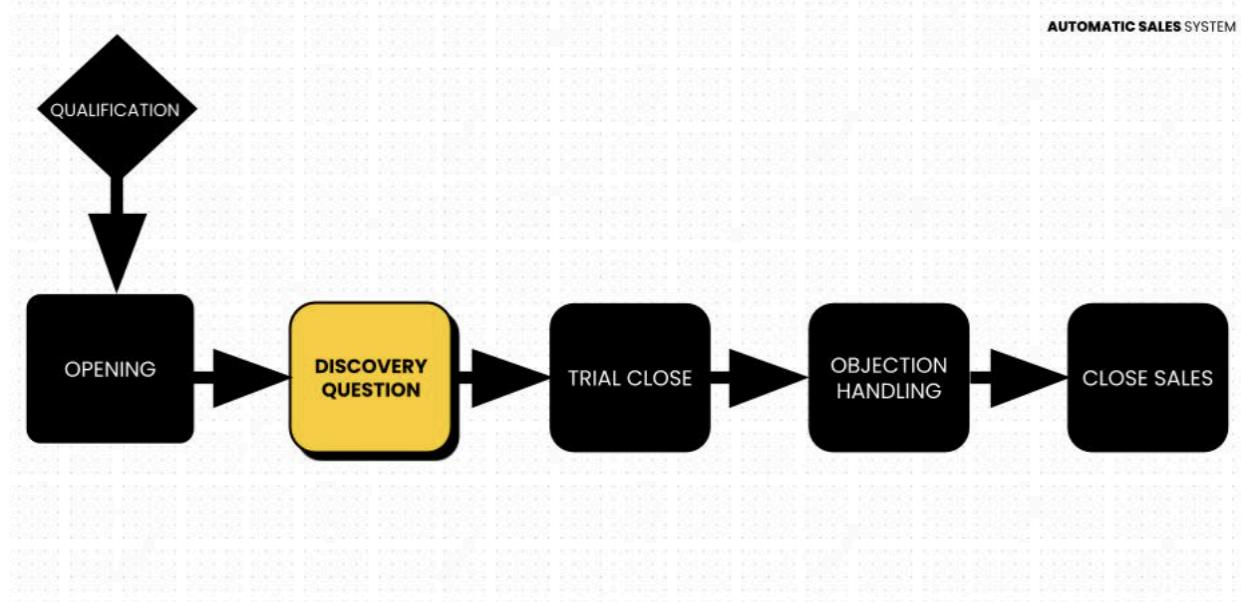




@How to Sell By Chat (DM)?

There are 2 main ways to close deals in AI Agency. Here's a guideline for talking to clients to close deals via chat or DM, for more simple case.

Important: You will need to create your own version of the script, using mine as a model. Ensure to customize it according to your specific needs and objectives. Pay attention to the structure and flow to maintain coherence. Feel free to add your unique insights and adapt the language to fit your style. Remember, this script serves as a foundation; your creativity and personal touch will make it truly effective.



Ultimate goals for sales process ✓✓✓

You can either **chat to close sales** or **set up an appointment** (more complicated case) to finalize the deal.



What you should do before closing:

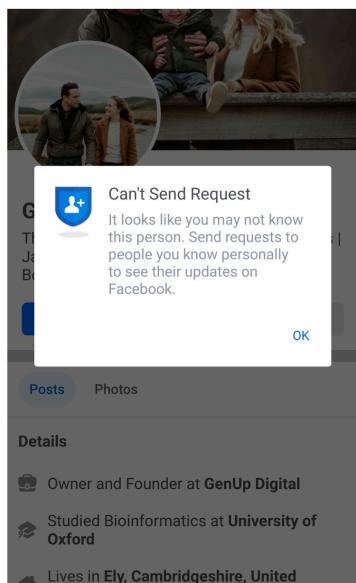
Preparation: Before proceeding with closing steps, ensure you have completed the following actions to find leads with a strong portfolio.

Daily Action

- Leave **10 Quality Comments** on Other People's Facebook Group Posts
- Add **10 “Quality” Friend Requests**

If you hit the friend request limit, you can split it into 5 in the morning and 5 at night.

You need a good ratio of people accepting your friend request, or else it will be limited more easily. So before you send it, make sure you've already built a relationship with him somewhere. Either commented below his posts, several times, or he replied to your PM.



add “quality” friends

So before you send, make sure you've already built a relationship with him somewhere.

Either commented below his posts, several times or he replied to your PM



Weekly Action

- 2-3 New Posts on Your Facebook Profile or Facebook Groups

Collect Testimonial

- Completed at least **5 free projects** & get testimonials

Is the numbers game & experience

Type of testimonials:

1. Video
2. Messenger/ Email (text-based)
3. Tag you in his profile/ FB Group

*Expect 2 video testi, 2 written testi, and 1 ghosted/ no-shows.

Benefits: Gain experience, gain testimonials and potentially to get free clients to paid

free clients to paid

Aaron Sim
10h ago (edited) in Wins
Finally the small win 100\$
Thank you all for the support and knowledge throughout this journey @Reeve Yew @Jackson Yew @Ashley Yuen
After few weeks of waiting, he finally reply my message and decided to work on the landing page design.
So what follow up message that I sent will triggered him to reply me?
First, send him this " I would like to help you redesign landing page for free in exchange of your testimonial "
Then, I redesign the first section of the landing page, and the half process of it
Yes and it works, instead of do it for free, he is willing to pay 100\$!

Norbu Lew
Mar 13 in Wins
原本trial的顾客满意到给我100usd!
各位各位. 加油哦你们也是可以做到的! #TTP

The screenshot shows a ClickSmith analytics dashboard with the following data:
Gross volume: MYR 458.84 (7 Mar - 13 Mar)
New customers: 2 (7 Mar - 13 Mar)
Transactions: 0 (29 Feb - 6 Mar)
Conversion rate: 44%
Average order value: MYR 0.00
Order count: 0 (29 Feb - 6 Mar)

Below the dashboard, there are Like (99), Message, and 82 comments buttons.



A. Opening 😊

First steps, how to greet your client effectively? How to start the conversation smoothly?

Goals: Create a positive first impression and build trust with new clients

Priorities: Referral / From Facebook Group → New Online Chat → Follow Up

(Type of new clients)

Guideline:

1. Don't worry about your English—be confident and clear in your expression.
2. Don't sound too AI, you are talking to a REAL PERSON, not a Robot!
3. Keep the introduction **SHORT and aim for a reply**: don't waste too much time on irrelevant conversation.
4. Asked open-ended questions, don't leave the conversation hanging.

EXAMPLES/ SCENARIO:

DM1: FROM REFERRAL

YOU: Hi, I was referred to you by XXX. She/He mentioned you might be interested in our services. Are you looking to start a new project, or redesign existing funnel/pages?

Answer: Thanks for reaching out! I would like to build a new website.

DM2: FROM FACEBOOK GROUP

YOU: Hi! I noticed your interest in our [specific service] from the Facebook group. Have you found one yet?

Answer: No, I haven't found anyone. Luckily, you texted me.

or

YOU: Hey xxx, happy to send over my portfolio.



But before I do, let me know what type of funnel you're looking for so I can send a similar funnel and you can see kinda what that looks like

YOU: Btw have you seen my portfolio yet? I'm happy to send over some of our most recent funnel designs if you want?

DM3: FOLLOW UP

YOU: Hello, How has everything been since we last spoke? Just wanted to follow up on our previous conversation.

YOU: How's your week been?

Answer: Yes, I'm fine. Is there something specific you'd like to follow up on or any new developments?

AI PROMPT: Generate examples of short online chat messages to new clients from (referral, Facebook group, follow up, etc...)

A1. Qualifications

But before that, it's important to know what type of clients you're looking for. How do you identify them? Are they legit? Are they good potential clients to you?

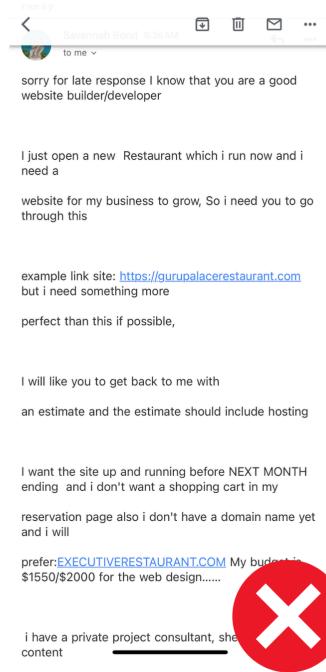
Goals: Identify international potential clients

Guideline:

1. Always check the leads' profile before accepting a request (Focused on the international **ANGMO** market, USA, Canada, Europe...)
2. Make sure you have a good profile setup too
3. Don't get too CLOSE: Maintain a professional distance from clients.
4. If you're unsure of whether it is a good country, check their average fresh graduate salary on Google.



5. Beware of those who offer **unrealistic offer** and ask for sensitive information before working together.



FAKE!!!

- **No email**
- **No restaurant**
- **No telegram**
- **No cheque**
- **Email with line breaks**



Ways to identify:

1. Profile information
2. Social media behavior (friends, content, culture)
3. Country
4. Visual Cue in media (photos, videos, etc)
5. Tonality/ Good Basic English Command (in the market, there's seasoned FB profiles that got hacked by scammers and bots before)



1. 承诺给你高薪但工作量很少
Too high paid & little task/ job

2. 还没开工，就先给你支票
Send you a CHEQUE before you've done any work.

3. 要求你给他钱，才能开工
Ask you to pay him before start.



4. 无法找到关于该公司的任何合法信息
You can't find any legit information about their business.

5. 合作前，就要求您提供敏感个人信息
They ask you for sensitive information (IC, passport, address, etc.) prior to working together.

6. 对面试或开会见面完全不感兴趣
They are not interested in interviewing you

7. 工作描述过于模糊或不切实际
The job description is overly unrealistic.



8. 不给你时间考虑，要立即决定。
Pressure you to decide immediately.

EXAMPLES (Questions to qualify even better)

1. What are your primary goals for your business? (e.g., brand awareness, lead generation, etc)
2. Just curious, where in the world are you messaging me? I'm from Malaysia.
3. Who is your target audience?



4. Can you tell me about your business and the products or services you offer?

B. Discovery Questions ?

Second, how do you talk to clients to understand their needs? What are the best ways to politely ask for their information?

Goals: Make sure goals and expectations are clear and match.

Priorities: (Clarity of needs) Precise goals → Still developing goals → Open to inspiration

Ways to handle:

1. Open-ended questions
2. Choose options (Forever give them A or B to choose)

Guideline:

1. You need to understand your client well first.
2. Determine why they need your services: are they (i) starting a new business, (ii) rebranding/redesigning, or (iii) looking to improve their existing setup?
3. Identify if the client already has a website or sales funnel, or if they have any prior experience with online business management, or new.
4. Ask for **sample or references**
5. Understand the client's **budget** and available resources.
6. If the conversation becomes complicated, invite them for an online appointment (case > \$1000 USD).
7. **ALWAYS END WITH A QUESTION**, don't leave the convo hang
8. Use a magic question when you face misunderstandings.

EXAMPLES/ SCENARIO:

DM1: ASKING NEEDS (GENERAL)



YOU: I can help you with that. Can you share a bit about your offer and what are you selling?

***Tips: Assess the client's clarity of needs based on their reply:*

- *Precise and clear: We are an online book store looking to increase our sales through a more effective sales funnel.*
- *Uncertain: I'm not sure. We need better online sales & traffic.*
- *Technical needs: We need a booking system and secure payments.*
- *Design-oriented: We want a modern, visually appealing site.*
- *Traffic-focused: We need a blog and social media integration.*

If they ask to do website, you can:

1. Agree to it, and ask for more info
2. Ask them why they want to do the website (understand their objective)

DM2: ASK FOR SAMPLE/ PREFERENCE

YOU: Do you have any examples of websites you like or want for this project? Could you share the links with me?

Answer: Yes, here you go. www.xxx.com

DM3: PLATFORM (WORDPRESS, AS, Systeme.io, GHL etc)

YOU: Where do you want it built on?

DM4: IF REDESIGN/ REVAMP PREVIOUS WEBSITE

You: Can you share your current website or funnel link?

Answer: Sure, it's www.example.com.

YOU: Great, thank you. I've reviewed your website, and it looks like it has a solid foundation. However, I see opportunities to make it more modern and user-friendly. What specific goals do you have for this redesign?



C. Trial Close

Goals: Assess readiness and create momentum for the final close

Guideline:

1. Observe their interest, and avoid rushing the conversation. Don't rush.
2. If they reject you, don't be discouraged. Stay open to negotiations and discussions.

EXAMPLES/ SCENARIO:

DM1: TIMELINE CLOSE

YOU: So, when would you like the project to be completed?

Answer: Next month. Is it possible?

YOU: Perfect! I'll send over the project timeline and PayPal link for your review. Once we have that in place, we'll get started right away. I'm excited to help make your website launch successful!

DM2: SUMMARY CONFIRMATION

YOU: To ensure I have everything correct, you're looking for [X, Y, Z]. Did I capture that correctly?

Answer: Yes.

DM3: NEXT STEP

YOU: If everything looks good, our next step will be to finalize the content. Does that work for you?

DM4: SOFT ASSUMPTION

YOU: Once we start, would you prefer regular weekly updates or bi-weekly check-ins?



D. Handling Objections

It's normal to encounter objections, but don't panic—most can be resolved. What should you do when clients ask...?

Goals: Clarifying misunderstandings and demonstrating your value

Guideline:

1. Use data and testimonials to support your points.
2. Listen, ask questions, and reply clearly and promptly.
3. Remain positive and stay calm while handling objections. Be patient.
4. Want to let them feel that doing it themselves can be challenging and time-consuming, and highlight the benefits of a proven system and expert guidance for faster, more effective results.
5. **MAGIC QUESTION: Answer a QUESTION with a QUESTION whenever you're unclear**

- Objection: Another person offered me a lower price.
 - Oh, what do you mean by that?
 - Do you mean you like his design more?

Note: If he's still speaking with you, chances are, he likes you more, just need to negotiate a bit on price

6. Use LET'S ASSUME IF

- **Price:** Let's assume if I am able to do \$300 as well, are you able to pay today?
- Let's assume if I am able to do 3 pages for \$700, are you able to start today?
- **Future project:** If I reduce my rate to \$500 for this project, would it be acceptable to return to \$1000 for future projects?
- **Testimonial:** If you like my work, can you provide a testimonial in return?
- **Pay in full today:** If you pay in full today, then...

EXAMPLES/ SCENARIO:

DM1: CONCERN ABOUT PRICE

Objection: The price seems too high.



Client: Hey, I really like your portfolio, but I noticed your rate is \$500 for a project like this. That's a bit out of my budget.

YOU: Normally, I charge \$500, but for this project, I'll do it for \$200. If you like my work, can you provide a testimonial in return? It would help me a lot!

Client: That sounds fair. I appreciate the discount and I'd be happy to write a testimonial if the work meets my expectations. Let's do it!

DM2: DOUBT ABOUT EFFECTIVENESS

Objection: I'm not sure if this solution fits our needs.

YOU: I understand your hesitation. Can you tell me more about what you're looking for?

DM3: HESITATE TO START

Objection: I don't have the time for this project right now.

YOU: Ohh, when do you expect it to start?

Client: "Next Month"

YOU: Okay sounds good! I'll follow up with you again next month.

(For TIME objection, don't push too hard, just get a clearer view on when the potential client will want to start, and mark it in your calendar, send a follow up message by then)

DM4: LACK OF EXPERIENCE

Objection: You're new; do you have enough experience?

YOU: What do you need help with? Let me see if I can do exactly that.

Alternatively, if you really want this project, and this is your first few potential clients, then always offer for FREE in exchange for TESTIMONIAL.



YOU: What if we could start with a small trial project? I can offer to build your landing page design for free. And if you really like it, I would love a testimonial from you. Sounds good?

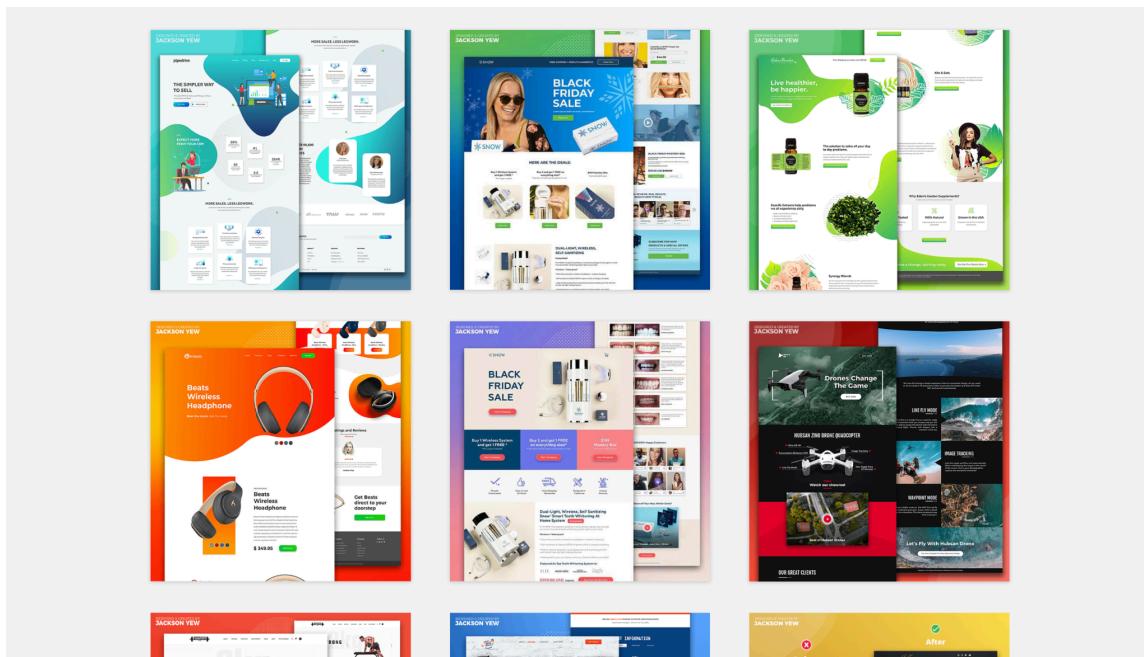
DM5: ABOUT PORTFOLIO & REFERENCES

Objection: Can you show us examples of your work or provide references?

YOU: Yes, here are some examples of my work. What specific types of projects or styles are you interested in? I can share the most relevant examples and references.

You need to **prepare a simple portfolio** beforehand. At least your own Personal Website.

You can build something like <https://landingpagedesignrr.com/>, without those copywritings, just need to have those mockups you did on the website. Like a gallery view. Or you can send him your personal branding/portfolio website.





DM6: Full Payment after project completed

Objection: Can I only pay the full amount after the project is completed?

Depends on your case study

E. Close Sales 💰

Lastly, what should you do when a client wants to pay? How do you receive money from your client?

Goals: Securing the agreement

Guidelines:

1. Preferred method: Paypal, Wise (International Client), if they request another payment option, then it is usually might be not legit
2. Can be full payment or 50% Upfront, 50% Upon Completion
3. **Have specific requirements in place when making exchanges.** (such as video testimonials, other more projects)

EXAMPLES:

DM1: OFFER PRICE

Client: How much do you charge for a web design?

YOU: Normally, I charge \$500 for a web design, but for this project, I'll do it for \$200 and send it to you 5 days from now.

DM2: SEND PAYPAL LINKS

YOU: Great! To get started, could you send a 50% upfront payment, with the remaining 50% due upon completion. Sounds fair?

Answer: Yes, please send it over.

YOU: Perfect. Here is the PayPal payment link: [Insert PayPal Link]. Once you've completed the payment, please let me know and send me a screenshot. We'll get started right away.

Answer: I've made the payment.



YOU: Thank you! I've received the confirmation. We'll proceed with [next steps]. If you have any questions, feel free to reach out. Excited to start this project with you!

YOU: Once the project is completed, I'll send a second link for the remaining balance.

F. Others scenario/ examples

CASE 1: ONLINE APPOINTMENT/ ZOOM

Guideline:

1. If the case is too complicated to chat, suggest a call, because it can be solved more efficiently sometimes.
2. Refer to Jackson Live Coaching to learn "How to close like a pro".
<https://www.skool.com/ai-agency-30-8665/classroom/505f99e4?md=4e4ac533b0384edc9fa7d3ba894dba48>
3. The sales sequences for online appointment: *Opening* → *Discovery* → *Transition* → *Offer* → *Objection**

YOU: I'd like to discuss your project in more detail and answer any questions you might have. Would you be available for a Zoom call sometime this [DATE]?

Answer: Yes, sure.

YOU: Perfect. How about [Time] on Thursday? I'll send you a Zoom invitation shortly.

Answer: xxx time is good.

YOU: Great! I'll send you the Zoom link now. See you [DATE]!

**Follow Up reminder: Hi [Client's Name], I've scheduled our Zoom call [date, time]. Here is the meeting link: [Insert Zoom Link]. Looking forward to our conversation!



CASE 2: FOLLOW UP MESSAGES

Guideline:

1. Follow up 3 times before you drop the leads,
If they leave you on seen, reactivate the chat within 1 hour.
If they keep ignoring you, send a follow up message after 24h. 3rd day, and
7th day.
2. Don't assume they have no interest in you. Maybe they are just busy.
3. It's okay if they don't reply immediately or if they've seen your message.
Give them up to 2-3 days to respond.

YOU:

- Hey, how's everything going?
- Hi [Client's Name], just following up on my last message. Let me know if you have any questions. Thanks!
- Hey, did you get a chance to review my previous message? I'd love to chat more.
- Hello, hope you're doing well! Any thoughts on my last message?
- Hey, I'm reaching out again to see if you're interested in [service/offer]. Happy to chat anytime.
- Hi, just checking in. I'm here to help with [service/offer]. Let me know if you're interested.
- Hey, just checking if you're interested in discussing [service/offer] further. Thanks!

CASE 3: FREE DESIGN, EXCHANGE TESTIMONIAL

Guideline:

1. Always have firm requirements in place when making exchanges, such as video testimonials.
2. Offer a simple plan like a personal branding page or landing page for free, but not a funnel or multiple pages.
3. If they are satisfied, offer them a paid plan or ask for a video testimonial.
4. You can always reject the deal if it is unfair to you.



YOU: Hi! I'm glad you're interested in my free website design offer. To get started, I'd like to understand your needs better. Can you tell me a bit about your business and what you're looking for in a website?

YOU: I'll design a one-page website for you, including your homepage with all the essential information and branding. If you're happy with it and want more pages or features, we can discuss a paid plan.

YOU: Additionally, in exchange for the free one-page design, I would appreciate it if you could provide a video testimonial about your experience working with me. Does that work for you?

CASE 4: ASKING FOR MORE INFO/ DETAILS

Guideline:

1. Collect data and information you need

Client-Provided Information/ Ideas	Other/AI Generated
**Branding guidelines (Logo, Name, Colours) Contact information (Phone, Address) **Domain name & hosting provider Business goals, objectives, target audience Budget & Timeline Custom functionalities (unique features) Legal requirements Context (text, images, videos)	Context (text, images, videos) Call-to-action elements Multilingual support Feedback / review system Forms (contact form, lead generation form..) Scheduling tools (appointments, events..) Customer support (live chat, FAQ..) E-commerce features SEO Keywords Third party integration

4.1: ASKING LOGO, BRANDING COLOUR, PREFER WEBSITE

YOU: Do you have a logo, color scheme, and preferred website sample?



4.2: DOMAIN NAME & HOSTING

YOU: Do you have a domain name and hosting provider? If not, would you like assistance in selecting one?

*YOU: A **domain** is your website's address on the internet (e.g., www.yourbusinessname.com). It's what people type in to find your site. You choose and register a unique domain name for your business.*

Hosting is the service that stores your website's files and makes them accessible on the internet. Think of it as renting space on a server where your website lives so people can visit it anytime.

4.3: CONTACT INFORMATION

Could you please provide your preferred contact details, including your phone number, email and business physical address?

4.4: LACK OF CONTEXT & CONTENT

YOU: If you don't have too much context or content (videos, photos, etc.), I can help you out. Just let me know what you need!

Answer: Thank you! I actually do need some help with photos and videos.

YOU: We can discuss the specific content you need and how I can assist you. Do you have any initial ideas or themes in mind?

Answer: I have a few ideas but didn't have much time to gather them yet.

YOU: No problem at all! Let's set up a time to discuss your ideas. I'll help you gather and create the content needed for your project.



Summary Tips

- #1: Always ensure you have a great profile first.
- #2: Conduct thorough research.
- #3: Start with a simple opening "hi."
- #4: Always end with a good question.
- #5: Don't rush.
- #6: Make a good offer plan.
- #7: Show professionalism.
- #8: Don't worry about your English.
- #9: Follow the sales flow.

Research and make sure they are a qualified person for you.



LIKE A DETECTIVE

Focused on the international market, USA, Canada, Europe...

Set up a good profile, lay some traps, and let them come to you.



LIKE A HUNTER

Observe them carefully, and then give them your best shot.

Just like chasing a girl, don't rush, don't scare them away.



LIKE A CHARMER

Just keep it short and aim for a reply; that means you still have a chance.

Always offer a plan, but ensure you get something in return.



LIKE A STRATEGIST

If you like my work, can you provide a testimonial in return?

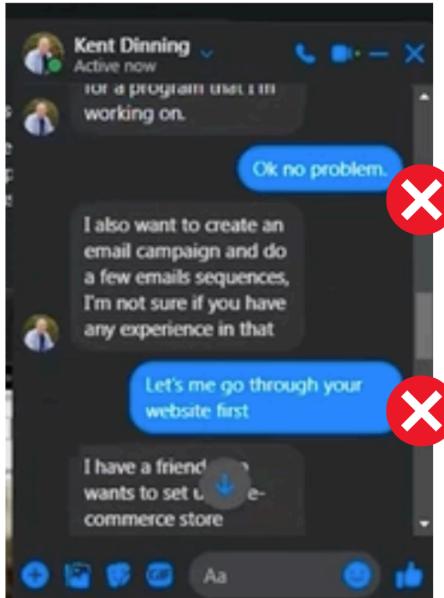
Provide valuable advice and insights to build trust and demonstrate expertise.



LIKE A CONSULTANT

Listen to them and find out what they really need. Keep it clear, and earn more money with less talk.

Real life chat examples:

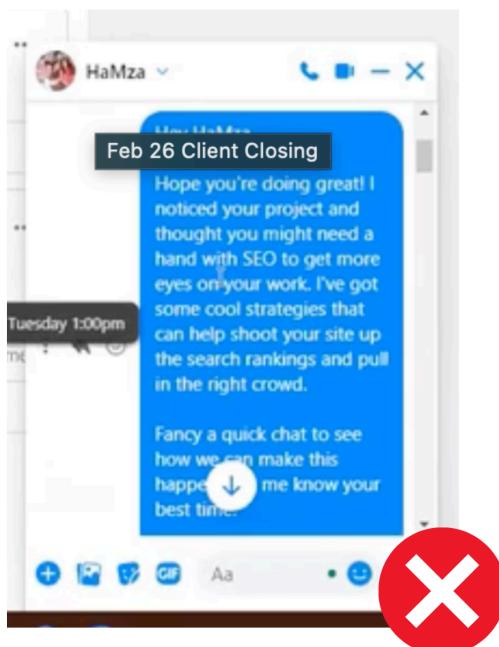


Don't end up with statement such as "ok, no problem"/ "let's me go through your website first"

Always end up with a magic question ✓

eg:

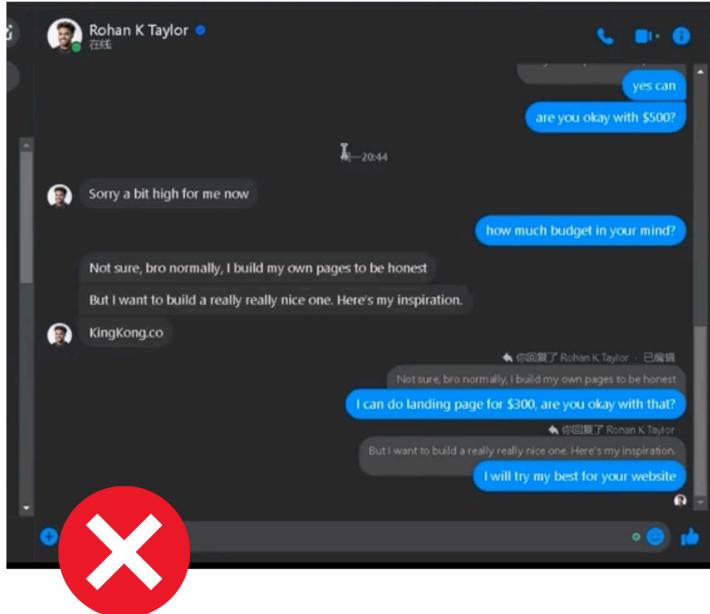
- What do you mean by that?
- What problems are you hoping to solve with this?



Don't send a long introduction; it can make you sound like a scammer.

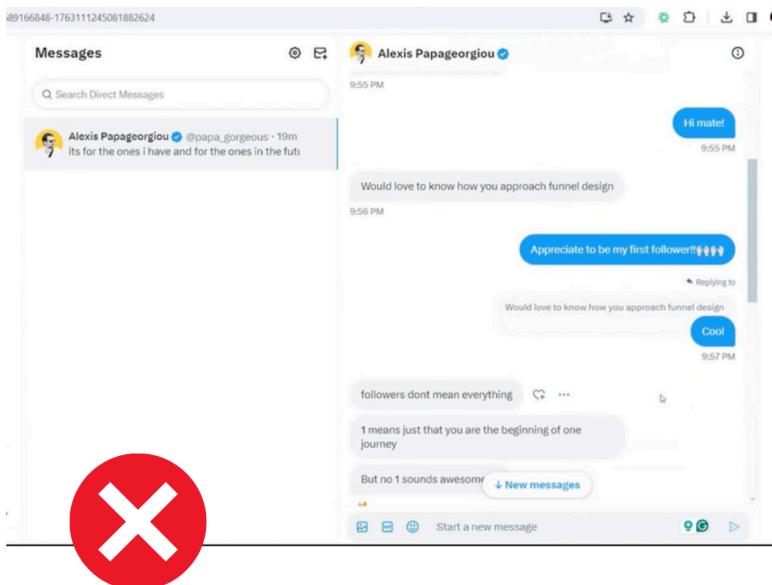
Clients, like you, don't like to read long messages. **The goal is to open the conversation and aim for a reply.** Don't rush, they can know you more based on your profile.

Start with "hi" and a simple question to ensure they read your message. Sometimes, a simple "hi" can also spark their curiosity.



He might be a good potential client, but don't rush to make an offer. Sometimes, you can also make an offer in exchange for something like a testimonial.

Normally, I charge \$500, but for this project, I'll do it for \$300. If you like my work, can you provide a testimonial in return?



Be more direct and don't waste time on good chat opportunities. Show your professionalism. It's a bad idea because it can undermine their confidence in your experience and abilities.