

How to Kick Off a Meeting With a New Client

Seven phrases to swap when you kick off a meeting with a new client, with exact wording that sets goals, deadlines, and reply times from the first call.

WHAT THIS ADDS

Every swap replaces something vague with something specific: a goal, a date, a list, a boundary, or a recommendation. New clients feel uncertain, and vague phrases leave them to fill the gaps with their own guesses. Specific wording closes those gaps before they turn into missed deadlines or awkward follow-ups.

When you need these lines

The first conversation with a new client usually happens fast. It might be a discovery call, a quick meeting after they sign, or a text thread on day one. In those few minutes, you set the tone for how the whole project will run.

The words you choose matter because the client is still learning how you work. A loose phrase like "I'll get started soon" can sound friendly but leave them guessing. A clear one like "First draft Tuesday" tells them what happens next, which builds trust and cuts down on follow-up messages.

1. Instead of "So, what do you need?"

Say: "What would make this a clear win in 90 days?"

Why it works: Uncovers the real goal fast.

2. Instead of "Just send me everything"

Say: "Send three photos and your logo by Friday."

Why it works: Specific asks get faster answers.

3. Instead of "Text me anytime"

Say: "I reply weekdays, 9 to 5, within one business day."

Why it works: Sets expectations before they break.

4. Instead of "I'll get started soon"

Say: "First draft Tuesday, final version by the 20th."

Why it works: Dates replace anxious guessing.

5. Instead of "Whatever you want works"

Say: "Here's what I'd recommend, and here's exactly why."

Why it works: Clients hire you for judgment.

6. Instead of "Any questions?"

Say: "What's one thing you're still unsure about?"

Why it works: Open questions get honest answers.

7. Instead of "Let's just jump in"

Say: "Quick recap: logo, five pages, live by June 1."

Why it works: Shared summary prevents later surprises.

The whole cheat sheet

Don't say	Say instead
So, what do you need?	What would make this a clear win in 90 days?
Just send me everything.	Send three photos and your logo by Friday.
Text me anytime.	I reply weekdays, 9 to 5, within one business day.
I'll get started soon.	First draft Tuesday, final version by the 20th.
Whatever you want works.	Here's what I'd recommend, and here's exactly why.
Any questions?	What's one thing you're still unsure about?
Let's just jump in.	Quick recap: logo, five pages, live by June 1.

DO THIS

Before your next kickoff call, write down three things: the client's 90-day goal, your first delivery date, and your reply hours. Then say all three out loud before you hang up.

What Fynl.io is

One portal a small business runs itself on, instead of five subscriptions that do not talk to each other.

- A CRM and pipeline that shows every lead and where it stopped
- A calendar clients can book straight into

- Quotes, contracts and invoices, with deposits taken up front
- A website and form builder, so the enquiry lands in the same place
- Your Gmail connected, so the whole thread sits on the contact
- Automations for the follow-up you keep forgetting to send

The AI runs on **your own Claude or ChatGPT key** — no markup on it. No SMS or phone calls yet. \$49/month per business, \$149 Agency, and we move your contacts over for you.

Fynl.io keeps your client details, calendar, quotes, invoices, and emails in one portal, so the dates and asks you agree on in a kickoff meeting are easy to find and follow through on.