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How to Have

The Perfect Discovery Call and Sell Your Very First Care Plans

HOW TO SELL YOUR VERY FIRST CARE PLANS

At **WP Buffs**, we want to work with clients over the long term so that their websites are always secure and fully managed. **We encourage potential clients to get on discovery calls with us** so that we can chat through their WordPress support requirements and so that we can educate clients on our services.

The purpose of these discovery calls is to make sure that any potential client is a good fit for the services you offer and that you're a good fit for their website support. It's a good opportunity to discuss everything that is in scope of your care plans and to discuss any tasks that may fall out of scope.

We also set expectations on working with our **24/7 support team** and how that aspect of the care plan is handled.

Discovery calls are a great opportunity to meet your potential clients face to face, answer their questions and to showcase the reasons you're the best team for the job!

We've put together a step by step discovery call guide for you which shares the process we use that has worked for us at **WP Buffs** to set expectations and to make sure that we're a great fit to support a clients WordPress website in the long run.

Although the order in which topics are covered isn't too important, sticking to it will help keep your discovery calls on track.

Let's go!

GETTING FOLKS ON A DISCOVERY CALL

Before you can sell your first white-label care plans to your current clients, you'll need to get them on a call.

- We use **Zoom** here at WP Buffs for our discovery calls, but a normal phone call will do just fine (especially if using video isn't a requirement).

- Use a tool like **Calendly** to book calls! You simply send a booking link to your clients and they find a time that works for both of your schedules.

- If you're using call booking software like Calendly, add a question for them to answer when they're booking the call: "What's currently your biggest challenge when it comes to WordPress?" This way, you can prove to them in your call that you're the best fit to solve that problem for them.

- We've found that short and sweet emails work the best to get folks on a call. Just make sure that email has a really enticing offer to push them towards booking their call.

Here are a few nice email templates for you to use:

P.S. If you already have great relationships with your clients, you may be able to get them to sign up for their care plan with a simple email request. We find discovery calls are the best way to fully explain 24/7 support but if you can get it all done via email, go for it!

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GETTING FOLKS ON A DISCOVERY CALL

EMAIL 1

Subject line: Let's grow together, [FIRST NAME]!

[FIRST NAME]!

I'm only sending this to **a few select clients** and you're one of them…

We're starting to offer 24/7 WordPress support to our clients and I think you'd be a great fit to work with us!

Our new website management service includes speed and security optimization, fully managed backups and updates, $1,000+ of premium plugins free under our care plans, and 24/7 monitoring and website edits. Boom!

Plus, it's all month-to-month so you can give it a try pretty much risk-free.

Want to give it a shot? **Book a private call with me here and we can discuss the details [LINK TO SCHEDULE A DISCOVERY CALL]!**

Let's do this, [FIRST NAME]!

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GETTING FOLKS ON A DISCOVERY CALL

Email #2 *(sent 3 business days later)*

[FIRST NAME]!

Just bumping my last email for you. Wanted to see if you could find 15 minutes for us to chat about **our team taking every single WordPress headache off your plate.**

By next week, your website could be fully managed 24/7 and **you'd never have to worry about another WP technical issue ever again.**

How exciting is that?

Our new website management service includes speed and security optimization, fully managed backups and updates, $1,000+ of premium plugins free under our care plans, and 24/7 monitoring and website edits. Boom!

Plus, like I mentioned before, it's all month-to-month so you can give it a try pretty much risk-free.

Want to give it a shot? **Book a private call with me here and we can discuss the details [LINK TO SCHEDULE A DISCOVERY CALL]!**

Let's do this, [FIRST NAME]!

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Email #3 *(sent 3 business days later)*

[FIRST NAME]!

Just shooting you another follow up here. Wanted to see if you could find a few minutes for us to chat about **fully managing your website 24/7.**

You know how you never quite have enough time to spend on actually growing your website and business? Well when you have a team that handles every WordPress issue and implements everything you want into your website, **growth just happens.**

And you want to really grow your website, right?

Our new website management service includes speed and security optimization, fully managed backups and updates, $1,000+ of premium plugins free under our care plans, and 24/7 monitoring and website edits. Boom!

Plus, like I've already mentioned, it's all month-to-month so you can give it a try pretty much risk-free.

Want to give it a shot? **Let's hop on a private call and discuss the details.**

Let's do this, [FIRST NAME]!

P.S. If you're not ready for this now, no worries at all. I'll give your inbox a breather from my emails starting now :)

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Your client has booked their call. Nice! Here's how you hone in on pain points and make the care plan seem like something they need to invest in.

1. Get personal

The first thing you should do is get to know your potential new customer and their business. Ask questions that help you understand more about the business, the client and their team. Find out where they are located and start chatting informally to find out a bit about them.

Once you've learned a bit about the client, a good opportunity to bring the call back to your agency is to ask how the client found you.

You might ask about where their team works - this is always a nice lead on to talk about your own team!

2. What made them reach out to you?

Leading the client to explain a bit about why they reached out to your agency in the first place helps remind them of the help they're looking for. You should now have a good idea of the problems they've been facing with WordPress and have identified how your care plans can help solve those problems.

Have they worked with a support team before? Did they face any challenges?

If they haven't already answered the question, make sure you directly ask them "What's currently your biggest challenge when it comes to WordPress?" so you can be the one to solve it.

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3. Plan summary and features

Screenshare.

Learning a bit about any specific challenges the client is facing with WordPress will help lead you to talking about our care plans. At this stage, it's a good idea to share your screen and show the client your care plan packages on your website. Provide a summary of all of the features our care plans offer and discuss a few of the challenges the client is facing that your care plans could help with.

- **24/7 website edits:** We provide unlimited small website edits for all our white-label clients. This is a huge selling point but any HTML, CSS, page builder edits, content/image changes or plugin adjustments are fully covered under their subscription.

- **Speed optimization:** All speed optimisation is handled manually for each website. These tasks look different for each website we manage, based on the way they're built and the possible improvements we can make. We run websites through popular developer tools like GT Metrix, and that gives us a good base to work on improvements. (WP Rocket Pro license included under Perform Plan)

- **Security optimisation:** All security optimisation is handled manually for each website. These tasks look different for each website we manage, based on the way they're built and the possible improvements we can make.

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We configure iThemes Security Pro for each website and we do a full WordPress security review to ensure that all software is updated and secure.

- **Uptime monitoring:** We monitor uptime and are usually the first to know of any downtime. We prioritise getting your website back online.

  Emergency support: Contact us anytime, 24/7, if you have a WordPress emergency. (Website down/front-end is affected).

How was the website built?

Now is a good time to ask the client if they know how the website was built so that we can get a good idea for which plan would be suitable for their website. Was the theme **custom developed** or had they used an 'off the shelf' WordPress theme which has just been customised with CSS?

If the client isn't sure, you can usually see which theme the website uses by using a **theme detector**

If the client website includes multiple languages, eCommerce, or membership areas they will require a **Perform Plan** (Your Perform Plan equivalent). The Perform Plan allows us to allocate all of the resources required to manage this software daily and to provide 24/7 edits/support. Share the equivalent of Perform Plan in your services.

If the website does not include that type of functionality, the plan recommended will depend on the level of support the client is looking for.

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(24/7 edits? Speed optimisation? Enhanced WordPress security?).edits? Speed optimisation? Enhanced WordPress security?).

4. Working with a 24/7 support team

Setting expectations for how to work with your 24/7 support team is super important to your customers success.

Be sure to discuss the following:

- All support is 100% email based. (Unless you plan on offering telephone support/consultation as part of your service).
  Within 2 - 6 hours, your client will receive a human confirmation that the team is working on their request.

- Our usual ticket turn around time is 24/48 hours **per request.**
  If the client has multiple (unrelated) support requests, they should submit a new ticket for each to get the fastest support.

When discussing 24/7 support, we often get questions about where our team is and how we're able to provide 24/7 support. You may get this question to.

WP Buffs is very proud of our diverse and fully remote team.

Each of our partners handle the answer to this question differently, but a good general answer is to let your potential customer know that you're team is fully remote and based from different locations to help you provide 24/7 support. Some of our partners choose to explain that they've partnered with a support team, but this is really up to you!

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5. In scope/out of scope

We tackle a wide variety of tasks for your clients under our care plans. Standard blog content edits, image switching and even installing and configuring new plugins.

Custom development is out of scope. That includes any task that requires our team to create our own PHP code or editing a plugin, as well as theme switches or migrations. Be sure to make this clear to your potential customer.

We offer our agency partners custom development as a supplement to our ongoing care plans. If your client has a larger project that requires custom work and is outside the scope of our care plans, we're happy to do it as an addition to our ongoing maintenance of their website.

Custom development is **$100/hr**. You are free to organise an hourly rate that suits your and your client.

The client will detail the project to our technical team via email and we'll give **you** an accurate estimate for how much time it will take so that you can quote your client under your own rate. We'll start working only once you give us the green light to move forward.

If a website wasn't custom built to begin with, the chances that your client will need custom development in the future are pretty slim. It's important that your customer knows that their support team will always be upfront and honest if any task falls out of scope of the care plan.

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6. Pricing

It's important to discuss the pricing of your care plans and to get a feel for your clients budget. Once you've explained your care plans and recommended the best suitable plan, move on to pricing. How does the pricing look for your clients budget? Do they have any concerns or questions?

7. Optional discount

We usually wrap up our calls by finding out if the customer has a timeline in mind to get started. This will give you an idea of just how ready a potential client is to sign up for your service.

We like to offer a small discount (10%) to clients who have a call with us. You might want to offer this, too!

RED FLAG METRICS

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Definitely spend the majority of your sales time trying to educate and convert hot leads, not try to turn cold leads into warm ones. Some people just aren't a good fit for your WordPress care plans, so referring them elsewhere is sometimes best!

Some red flags:

1. Someone starts out and immediately has a long list of edits that they want done. Some people see our care plans as cheap WordPress development. It's OK to let them know we aren't a good fit for a support care plan.

2. They ask about "one-time edits" in their pre-sale conversations. They ask about one-time speed optimisation (or one time anything!)

3. They don't follow instructions when signing up or when credentials/ details are requested.

4. If someone talks about needing one time edits or project work and isn't interested in partnering with a tech team long term, a freelancer or WordPress Agency would be a better fit for them.

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GETTING YOUR FIRST SUBSCRIPTION PAYMENTS PAID

We recommend sending a follow up once your call is finished. We use HubSpot (automated sequences) for our follow ups, but you can use any outbound email software to automate this process.

To get started, have your customer head to your checkout with the recommended plan.

Here's a great guide on how to accept recurring payments right on your website.

And here are some email templates you can use to close the deal!

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GETTING YOUR FIRST SUBSCRIPTION PAYMENTS PAID

EMAIL 1

Subject line: Let's do this, [FIRST NAME]!

[FIRST NAME]!

Really nice connecting with you today and learning more about [WEBSITE, BUSINESS NAME]. After chatting, I'm confident we'll be able to do a fantastic job supporting your site 24/7.

Not to mention we'll be able to tackle [SPECIFIC ISSUE THEY MENTIONED ON THE CALL] right when you sign up.

Here's what else will be included in your 24/7 subscription:

- $1,000+ of premium plugins free under our care plans
- 24/7 website edits and priority support
- Ongoing speed and security optimization
- 24/7 website uptime monitoring
- 4x daily cloud backups
- Weekly plugin, theme and core file updates
- Weekly reports detailing any on-site changes

And here are a few other questions I answered for you during our call:

- [ADD ITEM 1 TALKED ABOUT DURING THE CALL]
- [ADD ITEM 2 TALKED ABOUT DURING THE CALL]
- [ADD ITEM 3 TALKED ABOUT DURING THE CALL]

I also know we'll work well together, so that's a plus!

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GETTING YOUR FIRST SUBSCRIPTION PAYMENTS PAID

When you're ready to rock and roll, you can **get started with your care plan here with just a few clicks! [LINK TO CHECKOUT PAGE]**

It just takes a couple minutes to check out and once you do, we'll ask you to securely send us your login details.

Once we have those, our team will have your care plan(s) set up within 24-48 hours.

And if you have any other questions about working with us, feel free to reply hehre. Or go ahead and just **check out [LINK TO CHECKOUT PAGE]** whenever you're ready.

We've got your back, [FIRST NAME]!

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GETTING YOUR FIRST SUBSCRIPTION PAYMENTS PAID

Email #2 *(sent 3 business days later)*

[FIRST NAME]!

Just shooting you a friendly check in here.

I saw you haven't **gotten started with your care plan [LINK TO CHECKOUT PAGE]** yet so I wanted to make sure you didn't have any other questions.

Can you reply here and let me know if you have any last-minute questions?

It's my job to make sure you feel 100% comfortable before having our team fully manages [WEBSITE URL], so I'm here for you.

Or if you just needed a few days and you're ready now, go ahead and **Book a private call with me here and we can discuss the details [LINK TO SCHEDULE A DISCOVERY CALL]!**

Let's do this, [FIRST NAME]!

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Email #3 *(sent 3 business days later)*

[FIRST NAME]!

We're not the kind of team that lets things fall through the cracks. And that's why our customers love us.

Did you want to hop on another call before getting started? Feel free to **schedule one with me here [LINK TO SCHEDULE A FOLLOW UP CALL]!**

Or if you're ready to get started, you can go ahead and **Book a private call with me here and we can discuss the details [LINK TO SCHEDULE A DISCOVERY CALL]!**

It's super simple: select your care plan, send us your website details and relax.

Can't wait to have [WEBSITE URL] 100% optimized and performing at peak efficiency for you, [FIRST NAME]!

P.S. If you're not ready for 24/7 support right now, no worries at all. I'll give your inbox a breather from my emails starting now :)

GETTING YOUR FIRST SUBSCRIPTION TRANSITIONED TO WHITE-LABEL

Right when your clients give you the green light on their new care plans (or have made their first subscription payment), come right over to WP Buffs and officially get started with our white-label program.

Use the link we sent you in a follow up email to check out with your white-label care plans with your 20% discount automatically applied. Don't remember the link? **Hop into livechat with they Buffs and provide your email address so we can get you the link.**

Onboarding is next! Once you officially get signed up with the WL program, you'll receive a welcome email with all the details about onboarding, setting up your support inbox & white-label reports, and all next steps. You'll also receive access to our Partner Hub and your white-label help desk so you can see all your clients' tickets.

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See care plan pricing ➔

See white-label options ➔

Book a private call ➔