

When to provide something (and what) for free

In the current climate, professionals are thinking hard about when to do something for free for a client or a prospect is a good idea, and when it's not.

You provide something free either to build the relationship with the client or prospect or to provide a sample of what you do. Your challenge is to improve your relationship without giving away your core services.

You can help a prospective client, at no charge, in many ways. This framework outlines some options.

	Uses your expertise?	Applied to their problem?	Big?
Core services	Yes	Yes	Yes
Free sample	Yes	Yes	No
Information	Yes	No	Yes or No
Favor	No	Yes	Yes or No

You want to do favors and to provide free samples and information to advance your relationship with your client/prospect, but avoid giving away your core services. Your "core services" are when you apply your professional expertise on a significant scale to a client/prospect's specific problems.

Do someone a favor

There's lots you can give away (as described in [Building Relationships by Being Helpful](#)). Many of these favors (e.g., help with a contact, providing them a lead, sharing some of your personal knowledge) do not require you to use your professional expertise. They come from you as a person, rather than you as a professional, and are wonderful gifts.

One kind of favor does draw on your expertise. You can help a prospect learn more about how to address their problem: you use your knowledge to guide them to publicly available sources of general information (e.g., on the Internet). Your knowledge of their problem helps you do them a favor, but you don't actually apply your expertise to their problem.

Give away information

Information is often good to give away. It showcases your expertise, but doesn't replace what you typically do for a fee. White papers, webinars, newsletters and blogs are popular ways to give away expertise. Books both give away and demonstrate even more expertise. Information is reusable; you generally don't tailor your free material for a specific client. If you focus your information tightly on a specific niche, you can be very helpful to prospects and clients and simultaneously demonstrate with your free material that you are a leading light in that niche.

Provide your expertise as a limited sample

If a prospect has a need for a small project (or the start of a project) where you can deliver substantial value quickly, you might want to do it for free to get in the door. Let the prospect know, in advance, your usual rate for what you are delivering. If the value of what you provide greatly exceeds what you would have charged (and greatly exceeds what competitors would have delivered) you have a high chance of converting that prospect to a long-term client.

When and how to give away your core services

Giving away your core services makes sense in a few circumstances. If a client has a crisis that you can alleviate with a little bit of help, do it. They'll remember for a long time that you were available and supportive, and didn't try to gouge them when they were helpless. Even if you're not sure you can help, it's valuable to show up during a crisis and start to help however you can. If it turns out your professional services are called for, you can pitch in and send them a bill later and they'll usually be happy to pay it.

In other (non-crisis) times, be sure that a client understands the value of what you are doing for free. When you are asked to help for free, outline the value before agreeing. Describe what it will take, in terms of number of people and their time and energy, to honor the request. When you've explained, for example, that it will be five people spending a total of three days, then agree. Your investment on the client/prospect's behalf will be clear.

You can document quarterly what you've provided for "no extra charge" to a client. You can even have your own internal budget for doing this – so you can plan and track your investments in strengthening the relationship.

Something to try this week

Think about your 2-3 largest clients. What have you been doing for free for them? Develop an approach for talking with them about the value you are providing (through favors, samples, expertise, other) above and beyond what you are being paid for. Then talk with them.

Think about the information you already have that could be valuable to prospects and clients. Figure out how to package it and make it available – perhaps on your website.

What are these tips?

These monthly tips help professionals create more business and enjoy their work more. We focus on how to start relationships, how to build relationships, and how to convert those relationships into sales.