



# *The Nanny Agency School*

How to launch and grow a nanny agency the right way!

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## Module 3 Client Intake Process

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Welcome to module 3 of The Nanny Agency School: How to launch and grow a nanny agency the right way! In this module, we'll cover the Client intake process. The best way to secure a new contract is to be prepared, be personable and earn the trust of the Client. We will cover:

The Consultation  
Email Scripts  
Client Welcome Packet

Perform each task at your own pace and share your updates in our private Facebook group!  
Remember to email questions to [nannyagencyschool@gmail.com](mailto:nannyagencyschool@gmail.com)

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#### **The Family Consultation**

When a family reaches out to inquire about your placement services, it's best to have scripts ready to copy and paste to share important information. Many of the inquiries are usually the same, but you may get a curve ball every now and then. This is why it's important to have a clean website that's straight to the point. Review Module 2 for a summary on what to include on your website.

Your phone calls and emails should always have a selling point or goal, which is ultimately registering with your agency. If the inquiry is something that can easily be found online, direct them to the website. Either way, always steer the potential Client back to either a phone call or some sort of action on their end. You do not want to force the Client to register, but you want to give them enough information and answer questions so they understand how your agency works.

I always recommend scheduling an initial phone call instead of sending a long email explaining the process. The phone call will actually save time, and you'll know if a family is serious or not. Here are a few sample scripts that'll help get things going! Feel free to save, edit and customize the scripts on your own separate document.

**Family 1 - "Hi! I'd like more info about your services. I need a nanny for my newborn son."**

Hello,

Thanks so much for your reaching out to The \_\_\_\_\_ Agency. Congratulations on your new baby boy! We are excited about hearing more about your childcare needs. Please find details about our process, along with our family application at [www.everythingisonmywebsite.com/familypage](http://www.everythingisonmywebsite.com/familypage). Filling out the family application will give us a better idea of what you're looking for.

I'd love to schedule a quick chat to learn about your family and share more about our services. What's a good phone number and the best time to call?

We look forward to working with you!

Your Agency Signature

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**Family 2 - “Hello, I need an after school nanny. Any chance you can find someone by next Monday (It’s Thursday)? I’ve already filled out the application and am ready to pay. Do I pay online? We are in desperate need as our nanny quit last minute. Thank you.”**

Hello,

Thanks so much for reaching out. We look forward to connecting you with the perfect fit nanny! We definitely understand you’re in a bind and need a reliable after school nanny asap. We’ve received your family application, thank you! We do have a pool of fully vetted candidates who are available on call, and perhaps we can go that route until we find a permanent nanny.

Because you’re looking for someone to start rather quickly, I’d love to speak with you to solidify details and job expectations. I’ll go ahead and call the number listed on your application today. You’re also more than welcome to give us a call at 123-456-7890.

I will go ahead send over our agency agreement and the invoice for the deposit. Both must be submitted to get the process started with connecting you with our temp nannies.

Please let us know if you have questions. We look forward to speaking with you!

Your Agency Signature

**Family 3 - “Hello, how much does it cost to find a nanny? ”**

Hello,

Thank you so much for your inquiry! We look forward to learning more about your family and childcare needs. Our fees are based on the type of nanny you’re requesting. Are you in need of a part time, full time, temp/as needed nanny?

Please find an overview of our fee schedule at [www.lookatmywebsite.com/fees](http://www.lookatmywebsite.com/fees). I’d love to schedule a time to chat to answer any questions you may have. Please let me know the best number and time to call.

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**Family 4 - “Hello, I need a nanny 7 days a week from 7am-7pm. Is that possible? I have a 5 month old daughter and would also like the nanny to assist with household tasks. We travel quite a bit as well and would like the nanny to travel with us or housesit while we’re away. I’ve filled out the app and am ready to get started! Thanks!”**

Hello,

Thank you for reaching out and sharing your needs. We are so excited to learn more about your family by connecting you with qualified nannies! We do have several nannies who have household management experience, however I’m not so sure we’ll be able to place one person who can fulfill the schedule you’re looking for at 84 hours a week. We care for our nannies and want to make sure they have the energy and stamina to serve your family well.

Perhaps we should hop on a quick call to chat about a split schedule, or creating jobs for two separate candidates, a nanny and a household manager. Find a brief overview of each job role at [www.relaxmom.com/jobroles](http://www.relaxmom.com/jobroles), and let us know if any of the jobs lines up with what you need. What’s the best phone number and time to call?

We look forward to serving your family!

Your Agency Signature

**Family 5 - “Hi, do you offer discounts on your placement fees? We’ve been looking at other agencies and have found cheaper options. We have a 4 year old and a baby on the way. I’ve already reviewed your process and am ready to fill out the application.”**

Hello,

Thanks for your inquiry. Unfortunately, we don’t offer discounts on placement fees. With the time it takes to properly source, vet and handle the ground work on behalf of families, we have to make sure our time is covered. We work very hard and want to provide you with the right fit nanny. I am happy to discuss our process in detail if you’d like to provide a phone number. If you’re ready to move forward, we’ll keep an eye out for your application. Please let us know if you have any additional questions.

Your Agency Signature

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### Client Questions

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Gaining clarity on a prospective Client's needs is number one. Because they're investing such a large amount of money into a service they could very well do on their own, you want to make sure you ask the right questions. Before I get into the details of what the family is looking for, I always start out with small talk to lighten the mood and get to know the family a bit. Some parents are nervous about hiring someone they don't know and your job is to make them feel comfortable. It may seem cheesy to some but I guarantee it works! Families need to know you really care and have their best interest at heart. Here are a few "icebreaker" conversation starters and questions to consider.

1. How are you?
2. How was your week?
3. How's your day been so far?
4. Are you enjoying the warm (or whatever the temp is) weather?
5. How's everyone doing in the midst of the pandemic?
6. How long have you lived in the area?
7. Do you have family close by?
8. How are you adjusting to the new baby?
9. Are you getting any rest?

Usually the conversation will flow right into the consultation if you kick things off with an icebreaker question. Here are a few questions to consider during your initial consultation.

1. Tell us about your family needs
2. Is this your first time hiring a nanny?
3. What's the ideal work schedule?
4. What pay rate are you looking to stay within?
5. Are you flexible with this rate for the right candidate?
6. Are you offering job benefits? PTO, sick leave and paid holidays?
7. Are you aware of household taxes and overtime pay?
8. Would you like the nanny to drive while on the job?
9. Will there be a car provided or will the nanny use her own car?
10. Are you willing to reimburse for gas mileage, oil changes and occasional car cleanings?
11. Do you have extra carseats available or are you willing to buy an additional carseat?

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12. Do your children have any special needs or allergies the nanny should be aware of?
13. Are are your children on any daily medications?
14. Do you have pets?
15. Would you require the nanny to assist with pet care?
16. What would be your ideal candidate?
17. What are you looking for in a nanny?
18. What do your children like to do?
19. What's your parenting style? (Laid back, structured, free spirit, no structure, needs structure :-)
20. What are your preferred methods of discipline?
21. Are you ok with the nanny taking your children to area events and playdates with other nannies and kids?
22. Are there cameras in your home?
23. Do you have additional household staff?
24. What duties would you like the nanny to fulfill? (Some don't know what nannies do and they may need help with this)
25. Would you want the nanny to assist with additional household tasks? If so, are you open to paying extra for the add-ons?
26. When family comes in town do you expect your nanny to work?
27. Will you offer guaranteed hours or will hours change weekly?
28. Would you require the nanny to travel?
29. Would you need overnight or weekend care? (Nice time to share your temp services)
30. How is your family handling the pandemic?
31. Would you like the nanny to be vaccinated? Is this a deal breaker?
32. Will both parents work from home?
33. Do you have any questions about our process or the contract?
34. How soon are you looking to hire?
35. Are you ok with a trial period before the nanny starts?
36. Is there anything that's off limits with your children?
37. Are you open to covering professional development, classes or conferences?
38. How long would you need a nanny? Until kids are in school? Long term?
39. Would you like the nanny to take your children to doctor appointments?
40. Would you like the nanny to help plan birthday parties or maintain the family calendar?

\*Choose the questions that are best fit for the Client. They may cover a lot of this in the initial consultation\* .

## Module 3

### Client Welcome Packet

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Branded agency literature is an added bonus when prospective and new families inquire about your services. Having a welcome packet to expound on your services is a great way to guide families through the process. It'll answer questions that may not be online and provide additional information the family needs.

Once you've developed the content for your welcome packet, find a designer to help put it together. Fiverr is always a great resource and a huge money saver. Be sure to read gig reviews! You can also use Canva and copy and paste your content into their pre-made templates.

#### **Welcome Packet Content**

Cover page with your company's logo/images

Welcome to The \_\_\_\_\_ Agency page (Congratulations page)

Review of the agency process

Placement Packages and breakdown of fees

How long the process takes

Types of nannies and staff your agency refers

Areas your agency serves

Your agency values

Candidate screening process

Background check info

Household employee tax info (add referral links)

Nanny and home staff pay rates

Info about benefits, PTO and paid holidays

Employment contract info

Recommended interview questions

# Notes

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