

## **Getting Started In Your Regulated Canadian Immigration Consultant (RCIC) Journey**

CAPIC's recent networking event and roundtable chat garnered honest conversation as RCIC's discussed challenges, fears, successes, and next steps as they begin their lives as a RCIC. With themes of "transition, connecting, and confidence" as a background, a series of tips were borne. With thanks to all who attended and their blessing to share these collective tips, we hope that they can assist you in your own RCIC journey.

### **The following tips are listed in no particular order:**

1. Be sure to value your time and know that you have "knowledge to offer".
2. Consider charging for consultations, even if it is a minimal fee to cover that time!
3. Avoid working with close family members or relatives, and if you do, be sure to set boundaries.
4. If you have a lot of free time in the beginning, do one thing a day to improve yourself—from taking a LinkedIn course on time management, to learning how to use Microsoft Outlook properly, and researching new case law.
5. Number 4 is something that should always be ongoing—to continue to learn and grow, especially in the immigration field.
6. If you are going to be self-employed, you need business skills. Consider taking a short-term business course to learn business planning, marketing, and accounting. These are invaluable skills.
7. If you have the time, offer to volunteer, or shadow someone in the profession to learn—even one afternoon a week can go a long way in seeing 'how things are done'.
8. You have built in networks in family and friends. Ask them to spread the word about you. When you do a successful case, share that knowledge. Word of mouth referrals work!

9. Referral networks are huge. Network with other consultants or types of business where you can cross refer services. You might refer business and refugee clients elsewhere and they refer economic files to you. Your insurance agent may refer you clients, while you in turn can pass on insurance referrals. This is a Win-Win for all! We are not talking referral fees which are a no-no, but rather referred business!
10. Keep old fashioned business cards on you and hand them out. Talk to people wherever you go! You'd be surprised at the number of people who may need immigration services. You can have online business cards as well and share data that way too!
11. Work to have a life-work balance. Set office hours and maintain time for yourself!
12. Working alone is isolating. Strive to connect and meet people! That is what CAPIC is for, too! Attend networking sessions, webinars, seminars, be part of our IMMeForum and just reach out!
13. Ensure that you have sufficient funds set aside as you start off. If you have a second income, or a spouse who is working, that may give you some breathing room as you start. You want to be able to pay yourself and cover expenses. Don't place yourself in a position to take on a case that is not do-able just because you need the money.
14. A business plan is important—even if only a budget, with goals and timelines. This is a must in terms of being prepared!
15. Selling yourself is hard, especially when you have never had to do it. Think about taking some "selling courses" and practice how you can wrap up a consultation, or begin one, in terms of "promoting yourself and skills".
16. Confidence is a real asset in the immigration profession. It really ties into number 15. You want to project an air of confidence and competence and be able to follow through. Do you have a Zoom account? Practice talking to yourself and do a mini consultation. See how you sound as you project yourself. Practice with a colleague, friend, or a family member.

17. Don't ever compromise your ethics—honesty, competence, and communication are key!
18. Don't overpromise but look to overdeliver! You can't guarantee results, but you can guarantee good service.
19. Be objective in your dealings with clients. Professionalism and empathy are a must, but maintaining that objectivity is important.
20. "Why should I hire you?" is an often-asked question. A good reply is 'I am trained and educated in this field and have good knowledge. Immigration consulting is a regulated profession with competencies and professional obligations that must be maintained. You found me so I assume you are looking for someone to assist you! Of course, we must have full consultation to properly assess!'"
21. "Your fees are too high." is a regular comment from new clients. "My fees are set on market rates, complexity of the file and the knowledge I have. You are asking me to lower the fees; are you asking me to lower what I can bring to the file?" This is a great response that can be said with a smile, that often paves the way for mutual agreement on fees with a "let's see what we can do together."
22. Use surveys to obtain feedback from your clients. Reflect and see how you can improve.
23. Google reviews and testimonials are a good way to show potential new clients some of your successes.
24. Processes are important. Make sure you manage your time and resources wisely and have effective processes in place, for example: Consultation, retainer, instructions to client, document gathering, and form prep, input and review from client, file research and submission prep, final package review and input from client, submit, file monitor, and follow, and next steps to client.
25. Lay out steps and strategies to clients, so they are aware of the steps and process. Keep them informed.
26. Note deadlines and have good reminder systems in place.

27. A strong retainer will lay the foundation for you in terms of roles, expectations, boundaries, and task lists!
28. Decide what it is you wish to do—be self-employed and manage both clients and business, or work for someone else and do the "immigration". There are many opportunities out in the field beyond self-employment.
29. List out your strengths and weaknesses—this might help guide you in the direction you wish to go.
30. Many provinces offer small business grants to new start-up businesses. Be sure to check that out!
31. Do your research as you get ready to launch—what is my target audience? What will I specialize in? What type of fees do I wish to charge? Do I have sufficient capital to start off? How will I market my services? Do I need to distinguish myself from others?
32. Network, network, network! Connect with others. This is the best form of marketing!
33. Stay committed to yourself. Value your time and knowledge. Don't compromise on that.
34. Always be willing to grow and learn. Don't be afraid to ask questions!
35. Are you offering a "Dollarama or Gucci" service, or somewhere in between? The point being, never be that Dollarama. You have invested in yourself and are worthy. Charge reasonable fees, but don't sell yourself short.
36. You have chosen this profession. You will derive immense satisfaction in good service and successful cases. Helping others achieve their dreams is a good feeling!
37. You need to make a living but remember too, it is clients' lives and dreams! Ensure you are competent for the file. It's okay to say no or seek co-counsel!
38. Be passionate in what you do. Bring your energy and be prepared to make a difference! Even if only in your own small space!

39. Finding a mentor can be hard. Most want someone they can shadow and learn from without costing anything. While that is ideal, consider in your budget, a monthly consultation with a variety of seasoned colleagues and pay them for an hour of their time to ask them questions on their particular expertise. Many will charge a reduced fee to help but also understand that knowledge can come at a cost!

40. Believe in yourself! You got this!

41. Below are some articles on "business" just from a simple Google Search. There are many resources out to help guide you. Read this at your own discretion. We don't endorse any but have put them here for you to review! Remember to always keep in mind professional standards and regulatory obligations:

- [6 Business Skills You Need \(And How to Improve Them\) | Indeed.com](#)
- [How to Become Self-Employed: 10 Steps for Taking the Plunge \(paysimple.com\)](#)
- [Marketing Tips: 100 Powerful Marketing Ideas to Boost Your Business \(sevenstepsmarketing.com\)](#)
- [8 Digital Marketing Tips on How to Stay Ahead of Your Competitors \(lyfemarketing.com\)](#)

42. We wish you all the best in your RCIC journey and look forward to helping you map the way!