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Interviews

An interview is an opportunity for the client to meet you and for you to meet the client. It is not the time to start designing.

When the phone rings with a potential client, it is imperative that you use this opportunity to screen the caller for their appropriateness for your business. Always ask how they heard about your business. If the response is “from a friend”, inquire as to the person’s name so that you might say “thank you” to them.

Screening Calls

- How did you hear about our business?
- Please tell me about your project.
- Do you have a budget in mind?
- When would you like to start your project?
- Is there any portion of the project that you would like to do yourself?
- Who else are you interviewing?

Scheduling Interviews

An interview should be just that, an interview. This is most important time to establish your value as a professional as well as the value of your time. Depending upon the nature of the project, it may be appropriate to invite them to your studio (if it’s a new construction) or you may need to go to their project for a site visit.

- Schedule a day and time that is mutually convenient.
- An interview does not need to be more than one hour.

- Explain to them what will happen during the interview including a *brief* walkthrough, a review of your portfolio, and some Q&A on both sides.
- Call to confirm the day before your appointment.

Scheduling Initial Consultations

An interview and a consultation are two different things. While an interview is meant to get acquainted, a consultation is a *paid* visit in which you should give them ideas for their project.

- Schedule one to two hours, as required, and confirm the fee of \$750-1000
- Explain that you will be answering any questions they might have that do not require renderings of any kind. This is not a color consultation for the entire house, but a chance to discuss options for space planning, value of different types of projects for real estate value, and general programming.

The Actual Interview

This is your chance to demonstrate effective project management skills and to show them that you are in control of the *process*. While you will ultimately take direction from them, you are in charge of the project management.

- Be on-time and call in advance if you are running late
- Answer general questions about your experience, design philosophy, and what matters to you when you work on a project.
- Ask them questions about their past experience, what they want out of the process, and their needs from you. REFERENCE “Setting Client Expectations” in the Appendix
- Get a quick overview (without details) of what they would like to accomplish and then *you lead them* through the various rooms. If you let them give you a house tour, you will not finish on time.
- Repeat to them what you have heard to make sure you understand their needs.
- If you are interested in the project, ask them what they would like from you in terms of a proposal/contract. If not, tell them you will be in touch with them.
- At this point, it might be appropriate to discuss a timeline of a potential project, illustrating the general phases and how long they might take. This is an excellent exercise to flush out any possible conflicts in timing due to trips, events, holidays.
- Clarify their time frame for making a decision before you leave and get an oral agreement as to when you will speak/meet again.

Follow-up

If you want the project, you should respond in writing as you have agreed to. If you do not want the project, then you should send them a letter explaining that you are not able to take the project at this time and suggest alternative designers/options to them.

- Send them a thank you note.
- Provide a written proposal, if requested.
- Send them a “no-thank you” letter if appropriate.
- If they do not return your calls or follow-up, wait a few weeks and then try them again. While you do not want to be “hungry”, you do want to be diligent. I think that two calls to follow-up are enough and then let the project go.

Closing the Deal

While it is always desirable to close a deal quickly, working in haste does not always render the best pricing. Wait a minimum of 24 hours before responding with a proposal.

- Never give oral quotes unless you are estimating on the high-side. Clients remember the lowest number.
- Never start a project without a) a signed agreement and b) a deposit check. One without the other creates an imbalance that you may not recover from.
- Being too available to start a project can be a bad thing if your client expects you to always be available at the drop of a hat. Schedule projects on a timeline and get the client to agree to it.

Letter of Agreement

All projects need a letter of agreement, regardless of how small they might appear. The only exception to this is an initial consultation. An initial consultation can be done for an agreed upon fee with payment being collected at the *beginning* of the meeting.

- Have a letter of agreement reviewed and signed prior to commencing upon a project. If married, both spouses need to sign an agreement. If it is a business and it is a partnership, the general partner needs to sign the agreement.