

## MODULE 13 WORKSHEET

# CLIENT EXPERIENCE

### Client Experience Process

Are you providing an incredible experience for your clients at EVERY point of contact? Let's check in on each step:

1. **Initial Point of Contact.** How is your website? Informative and welcoming? And how is the phone answered at your office? Is the person upbeat and helpful?
2. **Fee Proposal/Agreement.** How do you set the mood for this meeting? Do you have gifts, food, drinks, a candle burning? And remember that this is the best time to introduce any team members, to set expectations and timelines, and to begin that critical process of communication that will make the client feel HEARD.
3. **Initial Design Discussion.** This is the time to really focus on the client and listen. Do you provide questionnaires? How/when should they be filled out? And who else needs to be included? Other family members? Everyone should feel heard.
4. **Design Presentation.** How can you make this fun and exciting for the client? This is the time to bring the bling! This, more than any point of contact, is what you're getting paid for.
5. **Presentation Follow Up.** It's still about communication – so how do you follow up? Will you write a note? Send a gift or a video of you in the new space? Keep everything very upbeat and client-focused. If there are revisions, don't allow that to bring the mood down.

**Twilight Zone!** Okay, you've got your head down and you're focused on the project. But don't forget about the CLIENT! How are you communicating? Are you still thinking about how to keep them excited and involved?

6. **Procurement/Pricing.** Talking about money can trigger some negative emotions in people, so how are you keeping these discussions upbeat? Are you focused on the products? Are you selling the "romance" of having the perfect pieces?
7. **Installation.** Be sure you're giving the client a "big reveal." That's part of the magic! Can you send the away to a spa? And how can you "set the stage" for their return?
8. **Exit interview.** If there is a punch list, it should be handled immediately. And be sure to thank the client with a note or small gift!