

When I started working for a small-volume home-builder/remodeler some eight years ago, I didn't have any specific expectations of the job. I only knew that I wanted to work in design, and I enjoyed working with people. In retrospect, my lack of expectations was a good thing, because the job I was assigned hadn't yet been invented. My mission, loosely defined, was to handle the clients and keep them happy. My boss was pretty vague about what he expected, but was also amazingly flexible. I was allowed to do as I saw fit, but it felt like I had been thrown into a lake without a life preserver. I was determined to make the job work, however, and after a bit of thrashing about, I first learned to tread water and, eventually, learned to swim.

Defining a New Position

My original task was to handle product selections with the remodeling clients, helping them to make their choices in a timely manner. Client product selection had been a major problem for the company, and the folks in the field were pulling their hair out every time clients changed their mind about which sink or light fixture they wanted, or where they wanted the window to go — again and again.

The design process was a mess, too. Most of the time clients lacked the ability to visualize the spaces they were discussing, and this would come out later in a fit of frustration. No one was doing anything deliberately wrong, but not much was being done to improve this phase of the job, either. This was especially hard on the company because it was trying to exist on referrals. Every time problems came up as a result of changes, the company ran the risk of losing future business.

Over time, I was able to define my job by seeking solutions to the complicated problems of customer relations. It involved more than sales, which did offer some guidance in defining the position. And it was more than interior decorating, although that was a big part of it. My new job was turning out to be coach, task master, designer, purchasing agent, salesperson, and friend to the client, all rolled into one. We eventually began calling this position the Customer Liaison, and this is how it works.

Initial Phone Contact

Client referrals come to us from previous clients, job-site signs, advertising efforts (such as home shows), and social contacts. It is my job to pre-qualify these leads and choose the ones to pursue. The first step is to get on the phone with the client lead for an initial chat. During this first phone call I fill out a simple lead sheet that I

Guiding Your Client to Job Satisfaction

by Lexie Wisley

Having one person support the client from start to finish yields a smooth-running project

call the Prospective Client Checklist (see Figure 1).

My initial phone questions are intentionally few: What part of town do they live in, what is their budget, and how did they hear of us? I try to weed out the calls that are inappropriate for our company. Travel time is a crucial deciding factor, as we can't afford to travel more than 20 miles one way or sit in crosstown traffic under any circumstances. Budgets have to be somewhat realistic (no \$5,000 kitchens, thank you), and prospective clients have to be forthcoming with basic information. If they want a ballpark number for their project but can't

give me a last name or return phone number, I politely end the call.

At this time, I also explain how our company works. In order to justify spending time on their project, I will need to meet with them in person and obtain more details about their project.

Since I work with a couple most of the time, I state a preference for meeting with both of them. But I won't arbitrarily insist on it, and will sometimes go to the first meeting with just one of them present. I want to meet the prospective clients and see the project as soon as possible after our first contact, before the fire dies down. Sometimes the short notice of this meeting makes it hard for

both clients to be present. However, I do insist that both be there for any subsequent meetings.

First Visit

My overall objective with this visit is to leave with a signed design agreement (described below) and a check in hand as a commitment to both me and the project. In order to do this, I need to complete the prequalification process that I started over the phone.

Client interview. My initial questions at this meeting are intended to discover the real objectives of the remodel. Rather than ask the clients detailed questions about the new space as they envision it, I ask them to describe the problems they are trying to solve by remodeling (Figure 2). By asking this, I can offer specific suggestions that will make their home more convenient, friendly, and attractive.

I listen very carefully to the clients' responses and often find that their perceived solution isn't the only answer to the problem. A good test of their commitment is to suggest an alternative or two. For example, if they want to add on to accommodate guests, I may suggest adding on a master bed and bath (a space they can really use and enjoy) and converting the existing master bed and bath for guests to use.

Or if they need space for an office and are considering an addition for this reason, I might suggest that they convert the seldom-used living room instead, and save the cost of adding to the home's footprint.

I also use this time to ask what their favorite things are about the house, as well as what their biggest complaints are. You can learn a lot with these questions, and use them to justify an increase in a project's budget by addressing one or more of these issues.

Looking for clues. The clients' existing home offers you a wealth of information about how they live day to day. For instance, I look for clues to their likes by assessing their current color scheme, and ask about any preferences they have for materials, colors, or design elements. Perhaps they have a fondness for the maple cabinets their friend installed or

PROSPECTIVE CLIENT CHECKLIST

Name: Richard Price

Other Family Members: Wife, Nancy
Two teenage sons, Rick & Tom

Address: 3890 SW Fairway Dr.
Stormville, Oregon

Phone #s (wk) 555-8324 (h) 471-2321 (fax) 555-4999
(wk) 555-8879 (h) (fax)

Referred by Roger & Betty Smith

Realtor _____ Phone _____

Build/Spec/Remodel Remodel

Specific Interest — project or lot _____

Status of Present Home Three bedroom, one bedroom being used
as home office

Requirement/Preferences: Convert garage to office & laundry
to allow teenage sons to have separate bedrooms

Price Range \$12,000 - \$18,000

Figure 1. The author uses this form to gather initial information on a prospective new client during their first phone call. It is a guideline to establish the suitability of the project and the client.

those solid-surface countertops they saw at the home show.

Often couples do not agree on what they need and how they will achieve it. You may find that strong disagreements between them may make working with them a hellish experience. If you encounter too much discord, you may have a reason to decline the job.

The real budget. Even though I ask about their budget during the initial phone interview, I ask the clients about it again during this preliminary meeting to discover just how flexible it really is. Most people let their true agenda show through in their own home, and I do most of the listening and little of the talking.

Money for remodeling is often discretionary, meaning that there is money available if you are able to make a good case for an upgrade or for additional work. I generally find that the money is there if I can address problems and concerns they have revealed earlier. Addressing their stated problems is an effective way to increase an otherwise anemic budget.

Past experience. I also want to know if these clients have remodeled before, and what that experience was like. When I have potential clients telling me all about a terrible experience with another contractor, I have to consider whether or not *they* were a part of the problem. This is another red flag waving, and another possible reason to decline the job.

Scheduling issues. The clients' timeline has to be reasonable — for planning the job, starting the job, and for the project's duration. If it's October 15 and they need the kitchen finished by Thanksgiving, you have an insurmountable problem. And you need to have them commit to the design and specification process, too. They have to be aware of the time involved, and make room for it in their schedule.

Preliminary Design Agreement

By the end of this first meeting, I should have developed a rapport with these clients and a solid foundation for a good working relationship. I have

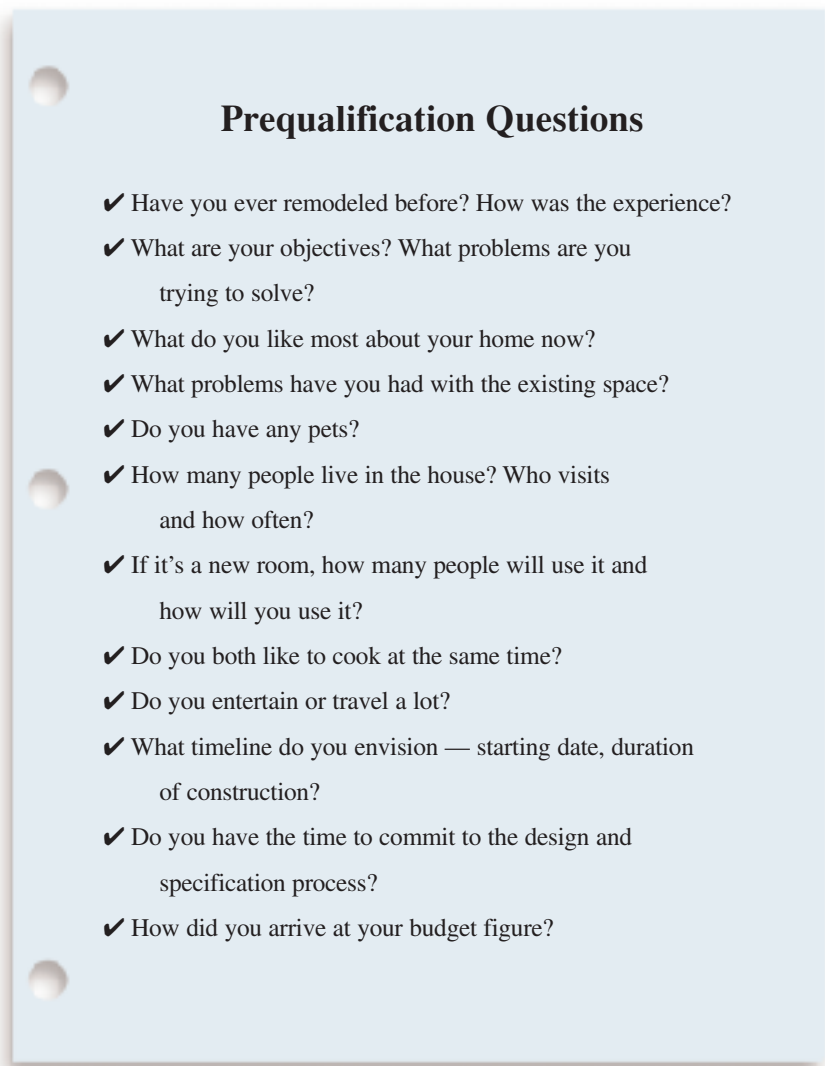


Figure 2. These are the kinds of questions the author asks the new client at their first face-to-face meeting. She writes down the answers — which contain important clues to the potential client's true intention — either during the interview or right after leaving.

impressed them with my expertise and abilities, and gained their trust. If I haven't done this successfully, then I probably do not have a client to work with. If the chemistry isn't right, then I need to tell them so, and wish them the best of luck on their project.

If the project and the client are a good fit for our company, I try to leave this meeting with a signed Preliminary Design and Schedule Agreement (Figure 3, next page) and a check. This design agreement spells out the overall objective for the remodel and requires the clients to pay for the time our company spends conceptualizing their project.

If the clients aren't ready to sign the agreement, I call back in a couple of

days to follow-up. Most people are more than willing to sign the agreement after discussing it between themselves and are anxious to have me get to work. Without a signed agreement, however, I do not proceed any further, and I tell them so. We cannot afford to do any more work without a firm commitment to our company.

Conceptual Drawings and Budgets

Once an agreement is signed, I begin working on the design and specifications for the project. Most designs for additions and major remodels are done by the company owner or an outside architect, but they use my notes to make sure we stay close to what the clients

want. However, I am the one who draws up the specific kitchen and bath layouts, and matches them to the existing or new space.

The company owner and I present a conceptual drawing and budget to the potential clients at the next meeting, and gauge their response before proceeding further. If we have really missed the mark, we know it before too much time is spent and can rework the concept to better fit the clients' expectations. If we run through more than three or four iterations, however, we

have to reevaluate the relationship. Sometimes you find a client that just can't be satisfied, and you have to let go.

From an approved conceptual drawing, we move to preliminary designs, and through to final designs. Before working drawings are begun, however, we need to finalize the budget picture by completing the product and finish selections.

Showroom Chaperon

I always insist on taking my clients to the various showrooms that our

company works with and insist on walking them through the options and choices myself. I target two or three showrooms per trip, and schedule two trips to view everything.

I meet them at our office and drive them from place to place. This always makes them feel special and catered to. In the car, we have lots of things to talk about — kids, hobbies, favorite activities, pet peeves. I pick up more clues about their expectations during the drive time than at any other point.

I call the showrooms we are to visit in advance to make sure I know which salesperson is working and who we will be talking with. I write down everything we cover in the showroom visits so that the clients don't have to worry about keeping track. They just concentrate on picking things out.

In this way I am able to control the suitability of the selections — they have to fit the budget as well as the physical limitations of the project. If there is no money for a jetted tub, or no room, or both, I steer the clients away before we waste time considering one. This is also when I introduce any appropriate upgrades and explain the benefits. A knowledgeable showroom salesperson can offer corroborating opinions.

Sometimes, special products, such as hand-made tiles, are high on the clients' list, and they are the only ones capable of choosing what they want. I help to set color parameters and basic criteria for them, as well as research some places for them to go look. The sheer number of hours devoted to trying to find this type of needle in a haystack precludes me from accompanying them. But once they have found something they like, we can then order samples and gauge the suitability of the material. Since this sort of selection is usually limited to a few specialty items, it is rarely a problem.

Overcoming indecision. Some clients have a difficult time making decisions. In these cases, I review the options with them again and try to determine where the problem is. Sometimes it's color, sometimes texture, and sometimes the



FOUR WALLS HOMEBUILDERS

428 Apiary Way
Anycity, OR 97224

PRELIMINARY DESIGN and SCHEDULE AGREEMENT

It is our desire to make a good faith deposit with FOUR WALLS HOMEBUILDERS for the purpose of proceeding with preliminary design work and cost estimates for the following project:

Kenney Residence Remodel
1972 Ladrillo Circle
Anycity, OR 97229

We hand you herewith \$650.00 in the form of _____ as deposit.

THIS DEPOSIT IS TENDERED ON THE FOLLOWING CONDITIONS:

- The budget range of the project is between \$_____ and \$_____;
- This deposit will be used to cover any direct design expenses incurred by Four Walls at the direction and approval of the client charged at \$65/hour in 1/2-hour increments;
- Any remaining amounts are to be applied to the final contract costs or refunded to the client in the event that the project is canceled by either party;
- Contingencies: _____
- Approximate starting date desired: July 1, 1999

Approximate completion date desired: October 1, 1999

WE HEREBY AGREE TO THE ABOVE STATED TERMS AND CONDITIONS AND HEREBY CERTIFY THAT WE HAVE READ AND RECEIVED A COPY OF THIS AGREEMENT.

WHEREFORE, this Agreement is made the day and year written below.

BUILDER:

HOMEOWNER:

(Signature)

Date

(Signature)

Date

Figure 3. The Preliminary Design and Schedule Agreement is intended to confirm the client's commitment to the project and the company. When a starting date is settled, it is a powerful incentive to move the process forward.

cost of the item. Once I know the problem, I can usually correct it and finalize any remaining choices.

If necessary, I make one more trip to the showroom and add one more set of choices to the mix. And, sometimes even this isn't enough. At this point, I need to ask the clients to trust me and my expertise, and go with the one I suggest. It is sometimes the only way to break the logjam and get the project moving forward again.

Keeping the Paperwork Straight

When the majority of the selections are made, I then lay them out and review them with the client to make sure we are all on the same track and haven't forgotten anything. We also catch any conflicts and are able to correct them.

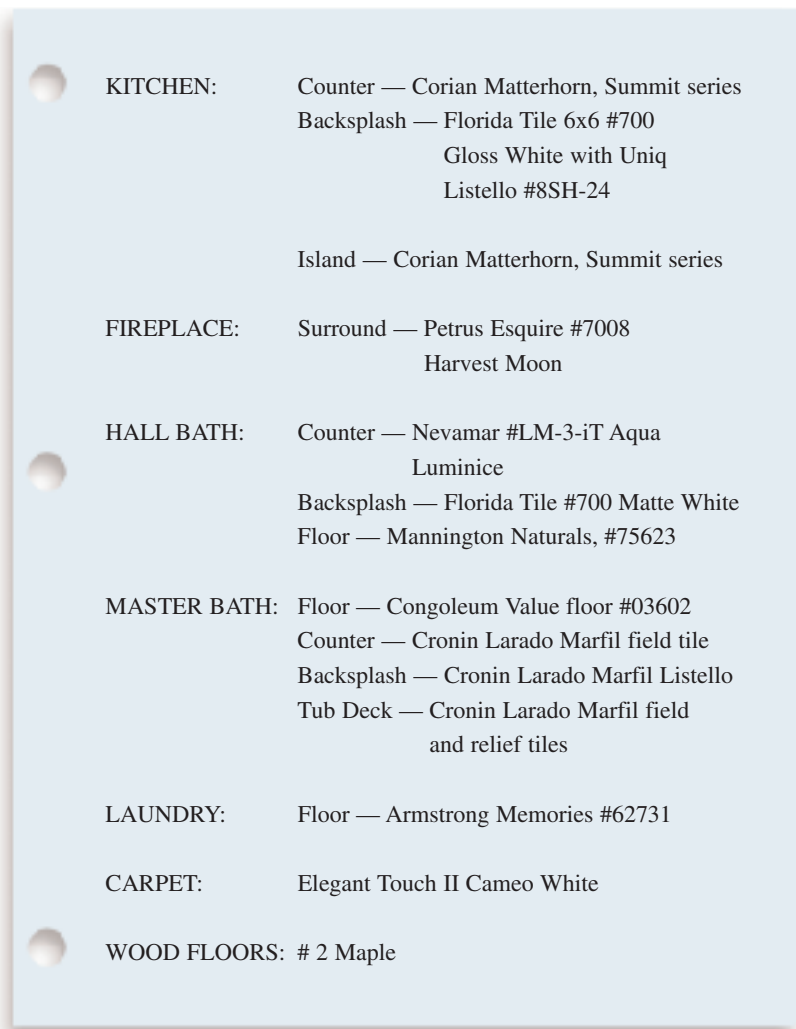
I send the clients home with samples and keep a sample for my own file, recording the product numbers and sources, as well as the intended use of each. If it is a large sample, I cut it in half, giving one half to the clients and keeping the other. This helps to eliminate any future memory problems and keeps multiple jobs in order for me.

After the choices are finalized, I compile a list of selections that's broken down by room. I list color numbers, names, manufacturers, and which showrooms they come from, as well as any special ordering or installation information. Typically, this is all settled before the contract is signed, and is attached to it so everyone knows exactly what they are getting.

Keeping the client involved in this process establishes them as owners of the decisions. This is very important when they suddenly do not like something after it is installed. They won't be apt to blame me or my company when this much detail is written down. I have found that misunderstandings are greatly reduced.

During Construction

I make it my job to collect any special installation requirements and relay these to the project foreman. During the job, I visit regularly to reassure the



KITCHEN:	Counter — Corian Matterhorn, Summit series Backsplash — Florida Tile 6x6 #700 Gloss White with Uniq Listello #8SH-24 Island — Corian Matterhorn, Summit series
FIREPLACE:	Surround — Petrus Esquire #7008 Harvest Moon
HALL BATH:	Counter — Nevamar #LM-3-iT Aqua Luminice Backsplash — Florida Tile #700 Matte White Floor — Mannington Naturals, #75623
MASTER BATH:	Floor — Congoleum Value floor #03602 Counter — Cronin Larado Marfil field tile Backsplash — Cronin Larado Marfil Listello Tub Deck — Cronin Larado Marfil field and relief tiles
LAUNDRY:	Floor — Armstrong Memories #62731
CARPET:	Elegant Touch II Cameo White
WOOD FLOORS:	# 2 Maple

Figure 4. This is a sample page from a Warranty and Information book that the author assembles for each project. The loose-leaf notebook gives the clients all the information they need to do maintenance repairs. It saves the Customer Liaison from having to dig through old records to answer questions later on.


clients and listen for any concerns or problems that may have arisen. Since I have developed a rapport with them, they will usually confide in me, and I can head off any little problems before they become big ones.

Project Completion

When the job is finally completed and everyone is thrilled to be finished, I complete my job by presenting my clients with a Warranty and Information book.

This book, actually a large three-ring binder, is compiled by me and includes all product warranty, maintenance, and installation information, as well as a complete list of all colors, product names, and numbers of everything we

have installed in the house (Figure 4). The cover of the book has the clients' names and address, as well as our company name and phone numbers for them to call with any problems or questions. This is a major confidence builder, and a service that makes a good impression on the clients and anyone else who may see it.

This system, which our company has refined over time, has led to a significant increase in referral business, as well as a steady stream of more relaxed clients whom everyone in our company appreciates working with. 

Lexie Wrisley works for a remodeling company in Beaverton, Ore.