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Client Touchpoints

BEFORE WORKING WITH CLIENTS, WHAT IS THEIR EXPERIENCE WITH YOUR BRAND?

	WHAT IS THE CLIENT EXPERIENCE?	HOW CAN IT BE IMPROVED?
FACEBOOK		
FACEBOOK LIVE		
INSTAGRAM		
PINTEREST		
HOUZZ		



Client Touchpoints		
	WHAT IS THE CLIENT EXPERIENCE?	HOW CAN IT BE IMPROVED?
PHONE MESSAGE		
EMAILS & EMAIL SIGNATURE		
ADS		
BLOG POSTS		
MEDIA COVERAGE		



Client Touchpoints

	WHAT IS THE CLIENT EXPERIENCE?	HOW CAN IT BE IMPROVED?



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## Client Touchpoints

### DURING YOUR FIRST INTERACTIONS WITH CLIENTS, WHAT IS THEIR EXPERIENCE WITH YOUR BRAND?

1. How do you interview a potential client? Do you have a website form? Do you have a designated staff person or screener for the initial interview? Have they been trained? Do you schedule a phone conversation? Do you take notes of the conversation? What if the screener knows that that the client isn't a fit? How do they handle the call? Describe how your clients SHOULD be interviewed:



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2. Do you have a second round of interviews and meet in your office? Do your potential clients want to talk to other clients? Do you have a current client reference list? How SHOULD you continue the vetting process? What do you do if the client is not a fit at that point? Do you send a packet of information before the second round of interviews? Do you send a thank you note?



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#### 3. How do you set up your office for the client?

Things to remember/consider:

- How do you set up your office?
  - Beverages, snacks, lunch
- Who prepares meeting materials?
- What meeting materials do you need and how do you talk to your clients?
  - Process of design print out
  - Project Notebook sample
  - Sample drawings you would provide if they were to become a client
  - Sample mood boards you would provide if they were to become a client
  - Estimated investment with examples of budget/cost range
  - Letter of Agreement sample
- Do you have an agenda to discuss the above? What about:
  - Project commitment deposit
  - Timing and schedule
  - Team members who would work on the project
  - FAQ
- How do you set up your visual presentation? Do you use a PowerPoint presentation or video?



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4. When you and the potential client decide the relationship will be a fit, how do you confirm it? Do you send a thank you note? Box of chocolates or flowers? Describe how your relationship SHOULD be acknowledged:



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5. How do you follow up your gift? Do you send a packet with the following?

- Team information - who to contact about what
- Next steps - outline
- FAQ
- Expectations
- Contract
- Homework for client
- Appointment time for next meeting
- Thank you note

What is the ideal follow up for your design firm?



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#### 6. How do you confirm your next meeting and set client expectations?

- Call in advance to confirm meeting
- Remind client what to expect at the next meeting
- What do you want to accomplish at the meeting?
- Set an agenda
- Where do you want to meet? The house? The lot and then a restaurant/office?
- If you meet at the house, what does your firm need to accomplish?
  - Photography
  - Measurements
  - Floor plan review
  - Inventory
  - Review Pinterest, Houzz or pictures for ideas
  - What is the best way for your firm to handle meetings and set up client expectations?



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7. How do you set up your client internally so you are ready for the project?

- Computer files
- Time billing
- Bins for samples
- Notebook
- Schedule
- Time budget

How do you delegate the responsibilities? Do you have timelines in place for follow through of delegated responsibilities? Do you have a Project Team kickoff? How SHOULD your firm handle the set up and management?



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8. How are you set up to communicate with your client? Is this scheduled in a calendar? What is the ideal way to communicate with YOUR clients throughout the project? How often do you communicate with your clients? How do you communicate with your clients regarding the following?

- Weekly Meeting Notes or "Friday" reports with updates
- Paperwork
- Purchase orders and invoices
- Receiving reports
- Updates for your client binders
- Contractor updates
- Scheduling meetings or design presentations?
- Follow ups
- Email
- Phone Calls (texting rules?)
- Installation
- General Firm Interaction

Use the worksheet to focus on each aspect.



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	WHAT IS THE CLIENT EXPERIENCE?	CAN IT BE IMPROVED?
FRIDAY UPDATES/ MEETING NOTES		
PAPERWORK/ MEMOS		
PURCHASE ORDERS/ INVOICES		
RECEIVING REPORTS		
CLIENT BINDER UPDATES		
CONTRACTOR UPDATES		



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9. What is your design presentation process? Does it show you in the best light? How long will a presentation take?
- How do you set up your presentation area?
    - Beverages, snacks, lunch
  - Presentation materials?
    - Notebooks (with logo?)
    - Pens (with logo?)
    - Tote bag
    - Tape measure?
  - How do you set up your presentation?
    - Presentation boards by room
    - PowerPoint slides by room
    - Binders
    - Clear trays with fabric samples by room
  - Do you have an agenda to review the presentation?
  - How do you handle re-design?



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## Client Touchpoints

**AFTER WORKING WITH CLIENTS, WHAT IS THEIR EXPERIENCE WITH YOUR BRAND?**

	WHAT IS THE CLIENT EXPERIENCE?	CAN IT BE IMPROVED?
PUNCH LIST		
THANK YOU		
PHOTOGRAPHY		
CARE & MAINTENANCE BINDER		
KEEP IN TOUCH/ FOLLOW UP SYSTEM WITH EMAILS, GIFTS, CARDS, CALLS, LUNCH, DRINKS, ETC.		



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Client Touchpoints

	WHAT IS THE CLIENT EXPERIENCE?	CAN IT BE IMPROVED?
REFERRAL REQUESTS		
CELEBRATE FINISH OF PROJECT		
END OF JOB GIFT/ GIFTOLOGY		
NEWSLETTER		



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### Client Touchpoints

10. How do you close out your client project internally?

- Computer files
- Asana
- Sample returns

How do you delegate the responsibilities? Do you have timelines in place for follow through of delegated responsibilities? How SHOULD your firm handle client close out?