



# Session #4



When They Call, What  
Will You Do?



The Interior Design Business  
*Success Studio*

*Are clients knocking down your door yet?*



### **Are your clients knocking down your door yet?**

“The Chat” is the core of your house call system. These ideas have been designed by myself and other experienced designers based on our joint years of working with clients, allowing us to have a relaxed, competent, and successful business. Many ideas will be shared today.

Have you done your homework?

- Have you identified your ideal clients?
- Have you reached out to community partners?
- Have you looked for a constant stream of fresh clients?

*What will you do when  
they knock?*


### **What will you do when they knock?**

What are you going to do when they actually call?

You have discussed your pricing already, now what?

Here's a note about pricing:

- Be sure you have solidified your packages and pricing and that you're very clear about their expectations before commitment.
- Iterate your services before you go into your first clients' home.
- Make sure that you have these conversations right up front.



You need to take  
control of your clients  
and the project!

**Knowing what to do when you get the first client. You need to take control of client and project.**

Critical in being successful: You're going to need to take control of the client and project; don't be pushy, but be in control in the beginning; you'll be happiest at the end.

Unhappy designers haven't been specific enough and haven't thought enough about themselves first. Although this is a service industry, you have to protect yourself to avoid burnout. You'll want to put family and cost first, but at end of day, you have to protect your own time and energy or burnout is eminent. You'll get tired of micromanagement and nit-picking about money, or if the client is just looking for a friend or someone to compare thoughts with; you don't want them to take your ideas and go elsewhere.

If you follow this program, that won't happen. You need your own system.



Set their expectations,


Establish the goals,

And protect yourself.



**Summary Thus Far: Set and clarify expectations, both of you and the client.**

- Do they want to go to fabric stores with you or will magazines or catalogs prevail? Will they give you a basic style of furniture or atmosphere they expect (Stickly or Supersonic?). How precise will they be?
- You need to establish goals, including pricing and what they really want.
- You need to protect yourself from folks who are just looking for ideas but don't intend to use your services.



## Having a system is important:

Establishes you as the professional that you are.

Gives your client a sense of security and confidence.

Allows you to pre-qualify.

Prevents your new client from taking advantage of you, and wasting your time.

“I LIKE CONTROL.”

-MICHAEL JORDAN

### Having a System is Important!

Design school doesn't teach this: As a professional like a lawyer, doctor, and you need to be taken seriously.

- When you going into the home, you need to be established as a professional designer, not a decorator, not doing a hobby. Gives client confidence that you know what you're doing. Using this system establishes your credibility.
- You need to gather minute details (like the color of your cat which sleeps on the sofa), gives your client a sense of security and confidence.
- Allows you to pre-qualify the clients. Some invite you over due to boredom or invalid expectations, or want to have something they can't have in the long run.
- Prevents new clients from taking advantage of you as a friend and wasting your time.
- Way you should progress, to avoid clients taking advantage of you and wasting your time. Explain what you're feeling and leave respectfully and gracefully. Maybe they'll get serious after all.

## WHAT DO YOU HAVE IN YOUR BAG?



## Know before you go!

Tape measure  
Phone or camera for pictures  
Sketchbook  
Pen  
Business card  
Contract of Letter of agreement  
Project Commitment Card

Be prompt, look professional, and use your  
BEST manners.

### Know Before You Go

#### Have a Design Bag:

- Tape Measure (25')
- Phone or camera for pictures
- Sketchbook
- Pen
- Business Card
- Contract or Letter of agreement
- Project Commitment Card

Please be prompt, look professional, and use your BEST manners.

**Never wear jeans, even if they're worth \$300.** They just project the image of a jeans wearer, even though a professional. White pants or capris are OK. Use your best manners, like asking if you should take your shoes off.

# YOU'RE IN!

It's time to get down to business.

A few minutes of chit-chat.

Remind them that you're here to gather information.

Ask to see the space.



## **You're IN!**

A few minutes of chit-chat. Traffic, weather, football results.

Remind them you're here to gather information.

Ask to see the space and don't want to waste time. "Show me what you have in mind."

No charge for initial call, unless they want to go ahead. \$250 is just a retainer fee for you to get started.

They'll be excited to show you what they want: Try to spend no more than an hour; ask for their ideas, their time frame, what they really have in mind. They'll be thinking, "At last, someone who will listen."



## TOOLS OF THE TRADE.

### Sketchbook

- Keep all of your information in one place
  - Address, phone number, project checklist
  - Measurements and quick sketches
- 
- ✓ Becomes my most important selling tool.
  - ✓ Keeps them involved and engaged.
  - ✓ Helps keep me on track when creating the design.
  - ✓ Keeps my projects organized for future projects.

### Sketchbook

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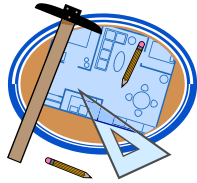
Not about drawing or artistic ability. Just a tool to document discussions and answers to questions.

The sketchbook is my most important selling tool. They can see other projects as well as theirs.

- Keeps them involved and engaged.
- Helps keep me on track when creating the design.
- Keeps my projects organized for future projects.

If someone calls, keep it in one place, so you can ask questions and answer theirs. Includes tracking sheets, incredible selling tool, keeps me on track. Keeps it organized for the future.

KEEP IT  
SIMPLE  
AND  
ORGANIZE  
D



Open-up your sketchbook.

Start by asking questions and take plenty of notes.

If it's appropriate, jot down the lay of the land.

Keep your notes organized by room.

Keep them on track.

Sketch book is very useful for repeat clients...reminders of what was done before. The Sketch Book really keeps everything organized for the project, both now and for the future. If someone calls for more design work, the book is your record of what was done last time. A very useful tool.

**Your Sketchbook:**

- Open up your sketchbook first; it's a very professional approach. It can even include previous jobs done by someone else.
- Start by asking questions and taking plenty of notes; anything they don't want, heavy traffic patterns, closet position, what they do want for sure.
- Keep separate page for each room is convenient. Ask how each room is used. How many seats are necessary, table size, is there a pool table?
- If it's appropriate, jot down the lay of the land. Maybe boxes for rooms for future reference.
- Think about traffic patterns, rooms in sunlight for shading ideas, how doors close.
- Keep your notes organized by room. Ask how is room used, etc.? Poker night, baby showers, overnight guests...

- Keep the clients on track so your ideas and theirs match.

## GET THEM INVOLVED IF YOU CAN.



When it comes to space planning, you can ask them to take a turn brainstorming ideas.

*Have them draw what they've tried, what they'd like, or what they imagine.*

- *It get's them involved and interactive in the process.*
- *Let's them know you're not trying to take over their home.*
- *Gives them a glimpse into the exciting world of design.*

When it comes to **Space Planning**, you can involve the customer by asking them to brainstorm ideas.

Have them draw what they've tried, what they'd like, or what they imagine.

- Get them involved and interactive in the process.
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GIVE THEM  
A VISUAL  
IMAGE.

Quick sketch your ideas:

Window treatments

Layout

Accessory arrangement

Balance and scale comparison

Quickly sketch your ideas:

- Window treatments....draw a penciled 6" sketch of a roman panel or sheer, for example. Let client participate in design.
- Layout of furniture in whole room, like identifying mantel as focal point. Gets customer involved and interactive in process.
- Want advice on the fly, but this is just a quick sketch...details are forthcoming.
- Accessory arrangement
- Talk about balance and scale

## KEEP THINGS MOVING

They will try to distract you:  
Keep your composure  
Remind them of your system  
Redirect their attention

Check out my LHI video on qualifying  
your clients.  
YouTube channel, Chelsea Coryell  
Design for a Living

### **Distractions – Keep things moving**

Client will try to distract you:

- Keep your composure
- Remind them of your system and how you ordinarily proceed
- Redirect their attention to the next level.

### **Homework:**

Check out my LHI video on qualifying your clients  
YouTube Channel, Chelsea Coryell Design For a Living

Debate about charging for first house all is subject.

KEEP  
THINGS  
MOVING

You're not trying to be  
rude, but you ARE being  
protective of your time  
and your talent.

### **Keep things moving**

You're not trying to be rude, but you ARE protective of your time and your talent. This is your method of determining if this is a project you want to take on.

I believe in collecting a \$250 retainer, but don't call it a "charge for the first house call". It only applies if they choose to continue. It pays for your detail design time.

KEEP  
THINGS  
MOVING

Do not give away your advice for free.

Don't let them micro-manage your process.

Give them a taste for your talent

Make them hungry for more.

**Keep things moving if you're going to make money**

- Do not give away your advice for free.
- Don't let them micro-manage your process.
- Give them a taste for your talent.
- Make them hungry for more.

## Notice EVERYTHING!

I MEAN  
EVERYTHING!

Remember the details and take notes when you can.

Listen, Listen, Listen and Repeat!

Ask to take pictures and measurements.

Be accurate and organized.

### Notice EVERYTHING!

- Remember the details of what the client is saying, and take notes when you can.
- **Listen, Listen, Listen and Repeat for confirmation.**
- Ask to take picture and measurements of every room and details.
- Note Relationships (sofa as related to walkway)
- Where art hangs and what it is
- Where are the windows and what style or size are they...would panels go to the ground, even if windows are not?
- Where is the fireplace and what's around it. Is there a mantel? What's it made of?
- Be accurate and organized.
  - What type of music do they listen to
  - What bags she carries may be indicative of style
  - Are there recliners with remotes
  - How do they treat their pets



I MEAN  
EVERYTHI  
NG!

## Notice EVERYTHING!

This will be the framework for your perfect design.

It will set you apart from every other designer.

You'll be more connected and engaged in the project.

Your clients will love you, and feel comfortable sharing their experience with their friends.

### **I Mean EVERYTHING! It will make you the “Designer of Choice”**

- This will be framework for your perfect design.
- It will set you apart from every other designer.
- You'll be more connected and engaged in the project.
- Your clients will love you and feel comfortable sharing their experience with their friends.

TIME TO  
GET DOWN  
TO  
BUSINESS

“OK, that was the fun part, now it’s time to get the business out of the way.”

Find a place to sit, and have “The Chat!”  
Qualify the project and your client all at once.

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“OK, that was the fun part, now it’s time to get the business out of the way.”

Find a place to sit, and have “The Chat!”

Qualify the project and your client all at once.

**Homework:**

- ✓ Do you have a Design Bag ready to go?
- ✓ Can you have those uncomfortable talks?
- ✓ Do you know where you’re going to get your resources when you learn about their budget?
- ✓ What steps are you going to take this week to make this all a reality?