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Introduction to Client Communication

During this course, we'll cover the importance of efficient communication, using templates to automate your sales process, and how to make a lasting impression once the job is complete. Each module covers a specific topic regarding client communication. We put them in the order we think works best, but you can skip around however you'd like.

About Our Courses

Each module includes a content video, examples of how our sample businesses applied the concepts, and an activity helping you apply the idea to your own business. We've included PDF, Google Doc, and Google Forms versions of each activity so that you can fill them out on a computer, from your phone, or print them out and fill them by hand.

Note: While you do need a Google account to open the documents, you do not need a google account to fill out the forms. The PDFs can be opened on any phone, tablet, or computer. If you don't have a printer, many local libraries will let you print a few pages for free, whether or not you have a library card.

If you're learning on the go, all videos can be downloaded to your phone, tablet, or computer for watching offline. The transcript and audio files for each video are also included at the end of the modules so you can learn in whatever way works best for you and your schedule. In addition, all videos are kept to ten minutes or less so you can fit them into your schedule easily. You can turn on closed captioning or adjust the speed of your video in the settings.

Expectations

First, let's acknowledge the driving force behind this course: trades, services and other contractors have a bad reputation around communication. This course will help your business stand out from others in your industry by creating a transparent communication process adaptable for any project. We will also talk about client expectations and some tips on making that process more efficient.

Clients prefer, and typically expect, quick answers with little effort on their part. Clear communication with your clients about what your business offers is imperative to creating a seamless, efficient sales process. The clearer your communication process, the fewer misunderstandings and mishaps on your job sites - leading to higher profit margins and a better client experience.

Being the best at your trade won't matter if clients can't count on you for reliable and consistent communication. If you were the client, what would your expectations around response times be?

Be one step ahead of your potential clients by answering their questions before they even reach out to you!

You can anticipate most common client questions by:

- Creating a FAQ sheet with questions you often get from new clients
- Providing a price list with all of your services, products, and prices
- Being transparent about your geographical limitations (if applicable)
- Excessive commute times cost you money, so consider limiting your services within x amount of miles from your home base

Make sure your FAQ, price sheet, and geographical limitations are clearly stated on your website, social media platforms, and advertisements. Also provide links to these documents in emails to clients. If the answers to their questions can be found easily, clients are more likely to hire your company. If you don't have these yet, that's ok. You can always add information later as you have time to create it.

Note: Many trades companies think it's hard to create a price list. If your company has too many different types of projects, build a sample project gallery with price ranges. For most trades and services, clients don't know what the going rate in a given industry is. So if your project gallery has some baseline pricing available, they know what to expect when you come out for the estimate. If you need help building one, check out our free course on building a project gallery.

Now that we have covered expectations and anticipating client questions, let's go over each module and what they'll include.

Modules

- Module 1: Initial Contact
    - This module goes over the basics of what you'll need in the beginning stages of that first client contact. This includes learning how to qualify your leads, using templates to accelerate the process, and discussing turnaround times and how they can impact your business.

- Module 2: Communication Around the Estimate
    - In this module we'll provide tips to guide you through the process of an estimate. We'll cover scheduling your estimate, using templates to organize information and streamline communication, sending the quote, and appropriate tactics to follow up with the client if they've failed to get back to you.

- Module 3: Communication During Job
    - This module covers how to keep your crews and clients on the same page, what a point person can do for you, and communication methods to use with clients when there are job changes or price differences.

- Module 4: Post Job Communication
    - In this module we'll go over the importance of maintaining a working relationship with clients even after the job is finished and invoice is paid. This is a crucial step often missed, but sets you apart from others. Clients who feel taken care of will recommend you to others. This will lead to a positive reputation, which equals more revenue down the road.

- Module 5: What's Next?
    - In this section, we'll use what you've learned over the course to create future goals and an action plan for your next steps in successful client communication!

By the end of this course, you'll be able to confidently use communication to better your business, and effectively use templates to save time throughout your sales process. As you work through the course, remember, you can always drop into our coworking sessions for additional support. Check our website for upcoming dates and times.