

Blueprint For Client Success

How to Get Your Client Relationship Off To A Spectacular Start By Developing Your Own Boundaries & Processes

{A FREE Guide For Service Based Creative Entrepreneurs}

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Hello Beautiful!

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How to Get Your Client Relationship Off To a Spectacular Start by Developing Your Own Boundaries and Processes

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In my work with the ladies learning code in the Web Designer Beauty School, it's almost a daily occurrence to hear one of them say "So, I've got this client issue and I'm not sure how to deal with it."

I've seen too many of them give in, give up, and get frustrated because they have no idea how to address the issue. Sticky situations are hard. Keeping your client relationships on track can be exhausting. I know you stress about disappointing your client. I mean, your reputation is everything to you so the last thing you want to do is offend your client or damage your reputation in any way.

As a trained coach, one of the first things I was taught was to design *a client alliance* — a way in which my client and I could work toward her goals & dreams while keeping in perspective how both of us (*and our unique personalities*) prefer to communicate. Being up front and decisive about how you work is key to ensuring you and your clients can stay the course and create magic together.

I've built on the idea of the client alliance and developed this blueprint based on my own experiences in navigating this thing we women do called being a boss. It takes some careful planning and a little bit of time up front on your part to develop your own blueprint for client success. My hope is that this e-book provides the framework & processes that will help set you and your client up for an awesome experience working together.

Enjoy!

xo,
K

How this blueprint works — > Take some time to answer the following questions based on your own experiences, preferences, and methodology:

How often can your client contact you?

How quickly will you respond?

How can clients communicate with you? (*Star the method/combination you prefer.*)

Phone	
Email	
Skype	
Text	
Facebook Messenger	
Other	

What issues/topics need to be communicated?

What doesn't?

Will emails come to you or your assistant?

When can clients contact you?

Daytime	
Evening	
Weekends	
Holidays	
Other	

How do you like to receive answers to your questions?

Individually in separate emails/conversations	
Saved up and send as one conversation daily/ weekly etc.	
Specific weekly/daily check ins via Skype/other	
other	

Confidentiality: *Your client needs to feel safe. Be clear about what you will honour.*

How will you respect confidentiality?

How will you communicate this confidentiality to your client?

If your client has a concern, what is the best way for them to address it with you?

How do you want to receive feedback?

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What are your policies and processes for things like:

Scope creep

My policy is:

Client no shows

My policy is:

Un-paid invoices

My policy is:

Rescheduling

My policy is:

How you handle a client who does not meet their own deadlines in getting information or decisions to you on time?

My policy is:

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How long can a project be put on hold if your client needs to take a break and what will the reinstatement fee be?

My policy is:

At what point will you need to start from scratch if they've been on a break for too long?

My policy is:

How long will your proposals and quotes be good for?

My policy is:

How do you handle non-responsiveness?

My policy is:

Explanation of your process: *Imagine that you're going to walk your client through what it typically looks and feels like to work with you. You're not only going to be articulating your logistics and process, but you can also share examples of what other clients have commented on with regards to your style and approach. In the space on the next page, write out what typically happens from first contact to completion.*

THIS IS WHAT YOU CAN EXPECT WHEN YOU WORK WITH ME:

WHEW! GREAT WORK! If you've taken the time to answer the questions in this e-book, you now have a personalized blueprint of your own boundaries and processes! It's time to consider how you can best have them available for your potential clients to read through, understand, and reflect on.

How do you want to communicate the information on your boundaries and processes?

	yes or no	how will we ***both*** acknowledge we've read & understood?
We will talk through each point it in our first call together		
I will email my blueprint as a pdf that they can sign		
I will create a terms & conditions form on my website that clients will need to sign before proceeding (and this content will be in there)		
Docusign (or other online digital signature provider)		
Hidden page on my website with content explaining my process as well as a form asking them to acknowledge each of my policies		
Other		

Bonus material! ADDITIONAL QUESTIONS YOU CAN ASK YOUR CLIENT THE FIRST TIME YOU MEET:

Results: *Get crystal clear on what your client's expectations are around results. You might ask:*

What are your expectations around results?

What are your fears or concerns?

What would disappoint you?

What would success or a win look like for you?

This is a great opportunity to be honest about whether you can deliver those results before you begin. Name the kinds of things that could interfere with these expected results/outcomes/timelines.

Client, what do you need from me in order for our work to be successful?

What typically works for you?

How do you best communicate?

Written (emails, text messaging, FB Messenger, Google Chat, Snap Chat etc.)	
Conversationally (process out loud, phone, Skype, Zoom, voice memos etc.)	

How do you learn best?

Watching	
Reading	
Doing	
Other	

How can I give you feedback? (This is one of my favorite questions.)

If I have a concern about something, what is the best way to address it with you?

What works best with you if you miss deadlines, go radio silent, or otherwise disengage?

What else would you like to design into our working relationship?

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As you listen to their requests, needs, and wants be honest about whether you can accommodate them. This is the time to be clear whether you will be a great fit or not. If you client expects things from you that you know you can't deliver on or that will be highly stressful or unpleasant for you this is the time to speak up.

Did you enjoy this e-book? I'd LOVE it if you'd consider sharing with your networks (I've even made them super easy — just copy and paste!):

Suggestion for FB and Linked In: LADIES! I just found the most helpful resource for helping me get clear about my own boundaries and processes for my biz! You've got to hop over to https://ActivateHerAwesome.com and download Krista Smith's new free gift!

Suggestion for Twitter: Do you need help building boundaries in your biz? @thekristasmith has a hot new e-book helping you create a blueprint that works! (click to tweet: http://ctt.ec/cad4y)

Suggestion for Pinterest: Copy this URL: https://activateherawesome.com/blueprint-for-client-success/ and add it as a pin on Pinterest!

***Email*:** Did you really find this helpful? Shoot me off an email testimonial and in my next iteration of its design, I'd love to give you a shout out! (email me hello@activateherawesome.com)

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Meet Krista Smith



Hey Beautiful, I'm Krista. Not only do I design + code websites, but I offer customized strategy and coaching that help you highlight your gifts, identify & attract your ideal client, create services that sell, and code happiness right into your business model.

If you'd like help developing your own compelling opt in, support around building a thriving business, or help with your online presence, I'd LOVE to talk.

Email me... hello@activateherawesome.com

xoxo,
K

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Congratulations!

If you've completed the questions and prompts in this e-book, you're well on your way to designing super satisfying client relationships from here on out. I invite you to revisit this blueprint periodically and adjust your processes and boundaries as needed.

Much love & respect.

xo,
K