

EP. 015 - 5 QUESTIONS TO ASK POTENTIAL CLIENTS BEFORE STARTING A DESIGN PROJECT

Kory: Last week, we talked to Erin Flynn a ton about onboarding, and that really got me thinking. One of the most important things that you can do before booking and then onboarding a client is obviously to make sure that you know all of the right details about their project. This will not only help you decide on whether or not to take on the project, but I really think that it also helps you make sure that you're able to start off on the right track. What do you think, Krista?

Krista: Yeah, I mean, if you don't know the information you need to know and you haven't asked the right questions, you don't know what strategies to use. You don't know what to keep in mind through your project, whether you're doing branding or a website. You can't do the project effectively without asking the right questions and getting the right details.

Kory: Totally, so today we are going to cover five questions that I think you should ask all of your potential clients before starting their project.

First and foremost, I think it's really important to ask your potential clients why they want a new design, and this is really important because sometimes they don't know. Sometimes they want a new design because they think they should have one. They may want smaller tweaks on their website, and they think to achieve those, they have to get a complete brand new design. I think sometimes for clients who don't really know the jargon and don't really understand some of what we do, they may say that they completely want to re-brand, and really what it is is they just want to kind of spruce up their logo a little bit or like I said, kind of spruce up their website in certain ways.

This will really help you and your client decide if they're getting design work for the right reason, and I will say here, this is kind of like the negative of asking this question. If you ask this and then the client realizes or even you realize that they don't need this massive project. Maybe they don't even need design work, or maybe they just need something smaller. You obviously are running the risk of losing the project or having the client pick something smaller where you're not making as much money, but I have to be honest, and I'm sure you probably feel the same way, Krista, even though you don't do design work. I would rather lose the project than take someone through a complete re-brand or a complete website design if they don't actually need it.

Krista: Yeah, it's not worth the work for either of you if that's the case, and I think a lot of the times, with this, it's something you end up realizing partway through the project. You're halfway done or 75% of the way done, and all of a sudden your client doesn't care anymore. They are checked out. They're over this. If they realize, "Okay I didn't really need this," they're not going to be as excited, or maybe they just don't want to finish it in the first place, so it is totally not worth it to get yourself into a project that isn't necessary.

Kory: Yeah, I absolutely agree, and I think too, another risk that you run into is potentially creating a design for someone who may turnaround and get another new design in just a couple of months, which I have been there, and it kind of hurts your heart to see your design go away so fast, especially when you put a whole lot of time and effort and just love into creating it and bringing it to life. If someone is not getting the design for the right reason, you really want to uncover that and dig in with them, even if it means you might lose the project. This is the most important question I think that you can ask to just make sure that you guys are off on the right start.

Now, the second question is something that I kind of stole from Krista at some point last year I think, and this is, "What are your goals with this project?" I think this ties into the previous question, but it's okay to ask a similar question. Something I have learned is that sometimes when you rephrase the question, it kind of makes them think about it in a different way. They might have answered, "Why are you wanting a new design?" with, "Well I want my website to look updated." Then they answer what their goals are with this long paragraph of thoughts and ideas. This is going to encourage them to really think about what they want and why they want those things.

Another reason this question is really important to ask is because at the end of the project, obviously you know it's successful if you come out with a brand or a website design that both of you are happy with. But there may be other goals that your client has, other reasons for wanting this new design, that you need to know about so you can help them gauge how successful the project is, and I think this ties in amazingly with what Krista talks about with strategic design. Obviously, if your client has goals to grow their email list, you want to ask this question so at the end of the project, and even a couple months later, you can look back and see, well, is your design helping them with this, and if it is, then you can know that the project was successful. If it's not, then you can think, "Okay well here are some things you may want to tweak," or you, as the designer, may want to tweak going forward in future projects so you can help make sure that future projects are successful.

Krista: This question also helps a lot with getting good testimonials because a big key of getting actual effective testimonials is letting your client focus in on the results you got them, and if you can remind them, "Okay when we

started, this is what you said your goals are. This is what is happening now," that's going to help them get you a testimonial that focuses on the results.

Kory: Totally, and you want those really amazing testimonials to display on your website and maybe even social media so you can get more clients who, they may not be looking for the same exact things, but having those really great testimonials that say, "Working with so-and-so made my email list grow really fast and I started booking even more clients, and they were also a pleasure to work with," so everyone who sees something like that would be like, "Yes, I want to work with that person too."

Krista: Yeah, being able to have people see results you got someone rather than just the part that says "Okay she was amazing to work with" is way better. Those are the kinds of things you want to be showing off online.

Kory: Totally. I think kind of going along with what we were just saying, asking this question really gives you an idea of things you need to focus on in your actual designs. Going along with the example I was using, if someone says, "I'm coming to you because I want to update my website so I can grow my email list and so I can book more clients in the long run," then you know when you sit down to start mocking up their new website design, "Okay, these are the things that they really want to do, so how can I add certain elements in the best places around their site to make sure they are accomplishing those things?" Instead of just starting with whatever you think looks good, and I think we all have a little strategy, obviously, that goes into our designs, but this will really help you hit on those things first and foremost.

The next question kind of goes along with the last one as well, and this one is, "What are a few big goals that you have for your business?" This may seem like, you're like, "I'm just a designer. I don't really know why I would be asking them what their goals are for their business. What if they don't know?" It may feel kind of silly at first to ask this, but I think it's a great idea for you to get an idea of what they are working on in their business over the next year or over the next couple of years so that you can help them get a design that is really going to help them accomplish those goals.

I know, for example, I had one client, sometime, I can't remember when exactly, but she told me, "I want to update my web design right now, but I know that within three to four months after I launch the new design, I'm also going to want to add like a shop." So, "That's not something that I want to add right now, but it's something that's important to me really soon after that." When we sat down and started working on her website, it was easy to keep that in mind. "Okay, how can I make sure that she is prepared and ready to go when she gets to that phase two without having to bring me on and pay me even more money to kind of get this going for her?"

Krista: Yeah, questions like this can give you a really good idea of what extra functionalities you need to keep in mind, and this is so relevant to me as a developer. Your design can probably stay pretty much the same. You can just use page templates for different things, but from a development perspective, things like adding a shop down the road or moving a focus from maybe getting opt-ins to an email list to hosting webinars and needing landing pages and stuff like that is huge. It's so important to ask these things ahead of time.

Kory: Totally, and if nothing else, I think it is really important to ask this so you can make sure that they are not going to outgrow your design. This kind of specifically goes for website design, but to make sure that they're not going to outgrow that within a short period of time. You don't want your client to pay you a couple thousand dollars for a whole re-brand and a website design that they may have to pay you or someone else again to completely redo their website design in a year or two years if they know they're going to be maybe going in a different direction or making some significant changes in their business not long after you're done with the first project.

Krista: Yeah, and this even ties right back to the first question you mentioned. You might even find that right now isn't the right time for them. If they're in a transition period and they're not really sure what's going to happen, they think it could be this or this, it might be a time where you have to sit down with them and be like, "Okay, do you really need this right now, or are you just really excited and want to do it? Will it be better for you and your business if we wait two months and revisit this and talk about what you're actually doing rather than what you think you're going to be doing?"

Kory: Oh my gosh. I think that is such a good point, and I'm really glad that you brought it up, because I think a lot of times when potential clients contact designers wanting an updated logo or a brand new website or whatever it is, it's because they're making some kind of transition in their business. But I think often times they come to you before they are done even fleshing out all of those details. It's like, "Well I know I'm going to be adding these new services," or, "I know I'm going to be adding these new products in the future, but I don't really have an official idea of what that's going to look like, and I don't know how that really is going to play in with what I currently do." It is a good idea to sit down and even if you have to say, "I would be happy to work with you, but I think you need to kind of work out some of these kinks a little bit in your behind the scenes and then come back to me and we can get started then."

Krista: Yeah. I am thinking back to when I actually got my website designed a couple years ago. I originally reached out and booked my designer for a totally different brand, website, everything than you see right now.

Kory: Holy crap.

Krista: Back then I was doing blogging about being a female in the tech industry. That's what I had her booked for, and her wait time was three months, and I emailed her one week before we were scheduled to start and I said, "I don't want to do this anymore, but I want to do this instead. Is that okay?" Luckily, she didn't ask for any of my content ahead of time, so she was like, "Yeah, whatever. That's fine with me," and now we have the website you see today instead of something totally different.

Seriously, if it was any other designer, someone that asked for content ahead of time, that would have been a huge, huge problem. In my particular case, I don't think there's anything she could have done because even if when I booked her, she would have asked "What big goals do you have for your business?" I had them at that point. I thought I knew what I was doing, and I didn't, but it's just so important to ask in case someone is smarter than me and can look ahead a little farther and be like, "Oh, nevermind. This is not the actual plan going forward."

Kory: Also, maybe not quite as spontaneous-

Krista: Yeah.

Kory: Because, as one day in one episode we will talk about, Krista is very spontaneous in her thoughts and projects and all that kind of thing, so I think too, you had a thought and you kind of ran with it, which I love about you, but I think some of us more normal human beings maybe don't run at 160 miles per hour the second we kind of get our ideas.

Krista: It's safer that way, yeah.

Kory: The next question that I think is really important to ask your potential clients is who their competitors are. This is another one of those questions where, especially if you haven't been designing for a long time, you don't have a lot of experience. It may feel kind of weird and silly to ask these things, but if you are doing branding or web design, which are the main kinds of designs I think everyone is doing, it's so important to know who your client's competitors actually are. This is going to help give you a clearer understanding of not only what it is your client does, because you may have someone approach you and they do this thing and you're like, "I don't really know anything about this industry."

It'll give you a clearer understanding about that. It will also help you get a better idea of who their target market is and also what kind of design that market is used to looking at because while we all have our general aesthetics, obviously you want to create something that's going to speak to your client's target market or their target audience to make sure that they are going to get the best benefits out of your design.

Krista: As someone who is not a designer, when I see designers doing this, it makes them stand out to me so, so much because I have a general understanding, kind of, of design-type things. I can maybe pick out certain things that people in the same industry have going on, but I think those of you who are trained in design or this is what you do, this is what you're good at, you pick that up on such a deeper level. That means so much more when it comes to an actual brand. When I can see if I got to a designer's process page and see them talking about competitor research, or I see it on Instagram, that person stands out to me as an expert who really, really cares about their client, so that's another benefit of asking this question and working it into your process.

Kory: I absolutely agree with you, and I think it is important to do these things, even if you are asking your client about who their target market is and about some of these things that this question kind of hits on because I don't know about you, but I have had those clients where they fill out my intake form and they don't give me enough answers. They are really vague with everything, and then they fill out the next questionnaire that I send them and it's still vague. It's like, "Well I do this for women who are stay-at-home moms," or something like that, and you're like, "Okay that's great, but what do these stay-at-home moms want to do with their lives? Why are they stay-at-home moms?"

There's so much that you can dig into with the target market and those sort of things, and I think that is why it is really important to ask this, because then you can know comfortably that even if your client is being kind of vague, maybe they're being kind of vague because they're not really sure totally and that's okay. But you have this list of competitors that you can kind of look at their sites, their brands, maybe even their social media accounts and kind of get an even deeper understanding of what your client is doing because they're similar. Even if they're doing something that's a little bit different, they will be similar.

Krista: You might also get an idea of things that like functionalities that your client didn't mention that you need to include. If your client didn't say anything about email marketing, this is a super simple example I always go to, but you go to their competitors' websites, and they're all super focused on growing an email list and doing all this stuff. You might then go back to them and be like, "Okay you didn't say anything about this, but it looks like it's going to be important. What do you think?" Then they'll be like, "Oh yeah. I didn't mention that," and really that could shape a lot of your design project.

Kory: Yeah, this is kind of going off track of what we're talking about, but I think you have talked about in a recent episode how you ask for inspiration websites so you can kind of get an idea of the functionality that you are going to have to build potentially.

Krista: Yeah, exactly.

Kory: Another reason you want to ask this is because it's going to help make sure that you're not doing anything too similar to their competitors without realizing it, and this is important because once you look at the competitors, you kind of have to take notes and then completely put them out of your mind so you don't get sucked into that. Like I said, you have to know that those other people are out there and what their brands and websites look like so you don't even accidentally get sucked into this.

I know there's one designer that I've been following the whole entire time I have had my business, and I thought it was really interesting to read that she had a client she had created a logo for. She absolutely loved. She presented it to the client and the client said, "I really, really like this, but it is almost identical to one of our competitors!" She had not done that on purpose. She had totally accidentally designed something that was just almost identical to one of her client's competitors' and then it's like, "Holy crap." Not only one, do you have to hope, which I think most clients would know that you didn't do it on purpose, but you have to hope they don't think you did it on purpose, and then two, you kind of have to start back at the drawing board because you weren't already kind of checking those things out from the beginning.

Krista: That would be so awful.

Kory: I know. I feel like I would be really embarrassed, but also I'd be like, "Well I must be doing something pretty good if I did something that someone else created that's really successful." This also gives you just a good chance to focus on helping your client stand out from their competitors with their goals. We talked about, in episode 1, how you can make your business stand out and you have to remember that this is also important to all business owners everywhere. They also want to stand out too, so if you're not sure what makes your client stand apart, you definitely want to make sure that you're asking them about their competitors, because then you can kind of take a look.

Even without doing a ton of research on the competitors, you can just naturally start to see on the websites, maybe on social media stuff they're putting on Instagram or something similar, just things that kind of make your clients different and how you can play that up in their design, be it in their logo or their website. Okay, and the last question that I think you should be asking is, "Will you need any complimentary add-ons?" This works obviously really well with branding because you can say, "Well do you also need business cards? Do you need stickers? Do you need envelopes and letterheads and all this other random stuff that someone might need?"

But it also ties into websites because sometimes our clients don't know how to make blog post graphics. Sometimes they need additional just marketing graphics in general, and they don't know how to do that. You want to make sure that you are taking care of that too. A lot of times, your potential clients are going to need or want something more than just what they're asking for, and they might not even realize it.

Krista: Yeah, for sure. If my designer would have asked if I could have used business cards, I would have been all over that like, "Heck yes!" Instead, I ended up trying to figure it out myself. A couple months later, I'm making super ugly business cards, so this goes with everything. Depending on your client, there could be a lot of different things that they need. It might not be a huge add-on to the package for them, but it's very worth it just based on the value they can get from it.

Kory: Exactly, and I think another good point is that sometimes your client is not asking you for these extra pieces if they aren't sure whether or not you offer it. We talked about this in a recent episode but I am blanking and I cannot remember which one. I offer a lot of additional stuff like business cards, PDF design. I am available for ongoing design work, but I do not advertise that on my website, so if I don't ask my clients directly if they need these things, then they are straight up not going to know, and that's going to put me in the position where they may go somewhere else and have someone else work on whatever those pieces are.

I actually had one client do that to me. I think it was last summer or the summer before that. I did not create blog post graphics for her, and so instead, she went to another designer to get those blog post graphics done and then continued to work with that designer on an ongoing basis, so I missed out on being able to help build out further the brand and website that I had created for her.

Krista: Lesson learned. Not fun.

Kory: Yeah, definitely. It's important to know that you don't necessarily have to try to upsell your clients here. You don't have to tell them, "Oh well you can get all these 500 other things," and include that in your package, and, "Then it's going to cost this much, and I really want you to do this because it's going to put a lot of extra money in my bank account." You don't have to be icky about it, but it is a chance to at least just let them know that you offer these extra pieces in case they need them right now or in case they find themselves in the future needing these things. Then they know they can come back to you, even if it's three or four months later, and say, "Hey, remember when you said that you do business cards? Well, okay, I need those now and maybe a couple other things too."

Krista: Yeah. I would even encourage you to put that in your "Goodbye" packet, or whatever off-boarding process. In your final "Goodbye" paragraph, just remind them, "Hey if you ever need this or this, whatever, down the road, let me know. I would absolutely love to work with you again." It's that easy. You will be in their mind when they need those things.

Kory: Totally, and if you don't add it to your off-boarding process, add it when you're following up.

Krista: Yeah.

Kory: If you wait a month or a couple months to follow up with your clients, mention it then. Say, "Hey, how are you doing? How is this new design working for you? What did your audience think of it? If you happen to need anything else in the future, please keep in mind that I can also take care of business cards, social media graphics, newsletter templates, like all these other things that you may need, and I would be totally happy to work with you on those things." You can literally leave it at that. Then they may respond and hopefully be like, "Girlfriend, I need all of that, so yes. Sign me up right now. Send me the contract and the invoice."

Krista: Love it.

Kory: But at the end of the day, just to kind of recap our episode here, asking these questions may seem overkill, especially considering how long your onboarding or intake questionnaire already is. I know sometimes I'm really sensitive about how many questions am I asking these people before I even book with them because I don't want it to seem overwhelming before we've even gotten started, but it is one of the most important ways that you can make sure you're getting the right information from your potential clients before you even get started, and maybe not even before you get started but also just making sure that it's the right time and that you are the right designer for this person.

Krista: If you're asking the right questions like this, the right clients who are dedicated to working with you and the whole process are going to be more than happy to give you these details. It's going to show them that you know what you're doing, you're invested, that you care about the project. Don't worry too much if you start feeling like your intake form is getting a little long.

Kory: Totally. I think too, going along with what you said earlier, I think it can also make you seem even more professional when you're asking about things like, "Who are their competitors? What are their goals for their business?" It really makes you seem like a more professional designer and it also makes you look like you care that much more than just the average designer because if I were not one and I were reaching out to several designers, I would more than likely go with that person who asked me these extra

questions because I would feel more comfortable putting my business in their hands.

Krista: Yep, definitely. 100%.

Kory: The action step for this episode is to take a good look at your intake questionnaire and to go back and add any of the questions that we have covered today that you don't already have included. Maybe even if you have some of these in there but they're worded a little bit differently, if you haven't been getting a good response from your potential clients so far, tweak them a little bit. Even if these questions feel too uptight for your brand's voice, you can always tweak them. Make them more personal or whatever. Make them seem more fun for your potential clients. It's just about making sure that you get that right information.

Krista: Thank you so much for listening. For show notes, past episodes, and more information about the two of us, visit us online at GetBackToDesign.Co.

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