



How to Run Successful Consultations

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There are many right ways to do a consultation, but these are Joann and Kelly's tried-and-true methods that make their consultations a seamless part of the onboarding process, leading to successful proposals and projects!

1. Charge for the Consultation

Value your own time; charge for your time and make the consultation an important part of the process.

2. Approach It Like You're Going to Be Working Together

Don't approach the consultation like a "meet and greet." Go in with the mindset that you are going to move forward with the project.

3. Have a System in Place

Have a system that keeps you on track. For Joann and Kelly, this means that they are going to take all the measurements on the spot, with Joann measuring and Kelly drawing and writing. Whatever it is for you, make sure you get clear about what you plan to do, then follow your system.

4. Build Rapport

Ask questions, get the client talking, and build rapport. You want them to like you so that when you get to the next step, the proposal, they want to say yes!

5. Get Clear on Next Steps

This is where Joann and Kelly's "Client Binder" comes into play. They bring a binder showing every step of the process with a former client and spend 15 minutes going through this in detail with the client. It shows professionalism, and the client knows exactly what to expect moving forward.