Creating The Perfect Client Experience
HELLO ... WORDCAMP!
RELATIONSHIP
Did we just become best friends?
Finding A Good Fit

• Ideal client profile (ICP)
• Pre-qualifying and screening questions for your prospects
• Follow up & Marketing automation
• Budgeting tips to make sure you see eye to eye
SETTING EXPECTATIONS
“I do not know what to expect”
Setting Expectations

• Sell the ongoing relationship
• Start the relationship with a detailed proposal
  – How your building it (custom, template, etc.)
  – How do you charge (Hourly vs. fixed fee arrangement)
  – When you expect to be paid (Milestones and payment terms)
• Outline project management and communication plan
WHAT WE OFFER

PROJECTS
Logo Process ........................................ 01
Project Plan .......................................... 03
App Development .................................... 05

SERVICES
Search Management .................................. 07
Security & Support ................................... 08
Photography & Video ............................... 09
Graphic Design ...................................... 10
Content Calendar ................................... 11
Flex Retainer ........................................ 13
PROJECT PLAN

DESIGN & PLANNING
- Discuss collaborative design process, establish project goals, review navigation elements and iterations desired now and next.
- DESIGN ELEMENTS
  1. Colors, Fonts & Target Audience
  2. Logos, Photos, Written Content and Outlines
  3. SEO Optimization Pre-Site
- CONTENT & CREDENTIALS
  1. Preliminary keywords, establish goals & Target Demographics
- SITE PLANNING & SITEMAP
  1. Navigation, Site Structure

DEVELOPMENT
- Development and building of the site’s beta version including requested features and functionality.

3 REVEAL
- Beta website launch
- Feedback of the beta website
- Provide initial feedback

4 LAUNCH & TRAINING
- Appropriate Training Materials Provided
- Detailed and Performance Testing
- Ongoing Support Included
- Local Listings Review
- SEO Review
- Review Applicable Documentation
- Training Materials
- Review Ongoing Support options
- E-Mail Setup
- Identify e-Buyer
- Hosting Migration
MANAGING THE PROJECT
I DONT GET THE BIG FUSS HERE
I LIKE THE SITE
Project Management

• Happy & surprise free
  – Keep decision maker involved
  – Weekly check-in
  – Addressing scope/billing issues early

• Informed & engaged
  – Project management tools
  – Customer portals
  – Ticket/revision systems

• Walking billboard
THE FUN BEGINS
The customer is always right
THIS IS WEB DESIGN

Before client presentation  
After client presentation  
Final approved website
Kickoff & Design Phase

• Don’t start without a contract and a deposit
• Listen and provide a needs assessment, and make sure client understands “you’re the expert”
• Get early design approval and revisions before development
  – Design presentation in browser
  – Mockup and wireframe process
“Be more constructive with your feedback”
Development

• Avoid icebergs
  – Dealing with delays and timeline
  – Addressing client feedback and revisions
  – Sticking to your scope of work
  – Police clients homework
    • Content (Migrate, develop, wait)
  – Outline next steps
Launch & Delivery

• Setup for success
  – Involve your client in testing before you go live
  – Follow launch checklist to ensure quality standards and consistent delivery
  – Provide clients training systems
  – Look forward to next phase to transition them to an ongoing relationship
ONGOING RELATIONSHIP
WEBSITE IS DONE!
FALSE. A WEBSITE IS NEVER "DONE"
I want a happy ending, like in the movies
Ongoing Relationship

• Staying in touch
  – Personal thank you card
  – Check-ins (monthly, quarterly, bi-annually)
  – Drip Campaigns / Marketing Automation

• Support
  – Tiered plans
  – Included warrantee

• Work
  – Version rollouts (v1.1)
  – Marketing programs
It’s a community!
Questions?

Connect
@stirltech

Call
781-369-5154

Email
Thomas@stboston.com

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