



11/15/16

Creating The Perfect Client Experience



stirling
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HELLO ...
WORDCAMP!





ALEXANDRA MARTINES



Upstatement







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

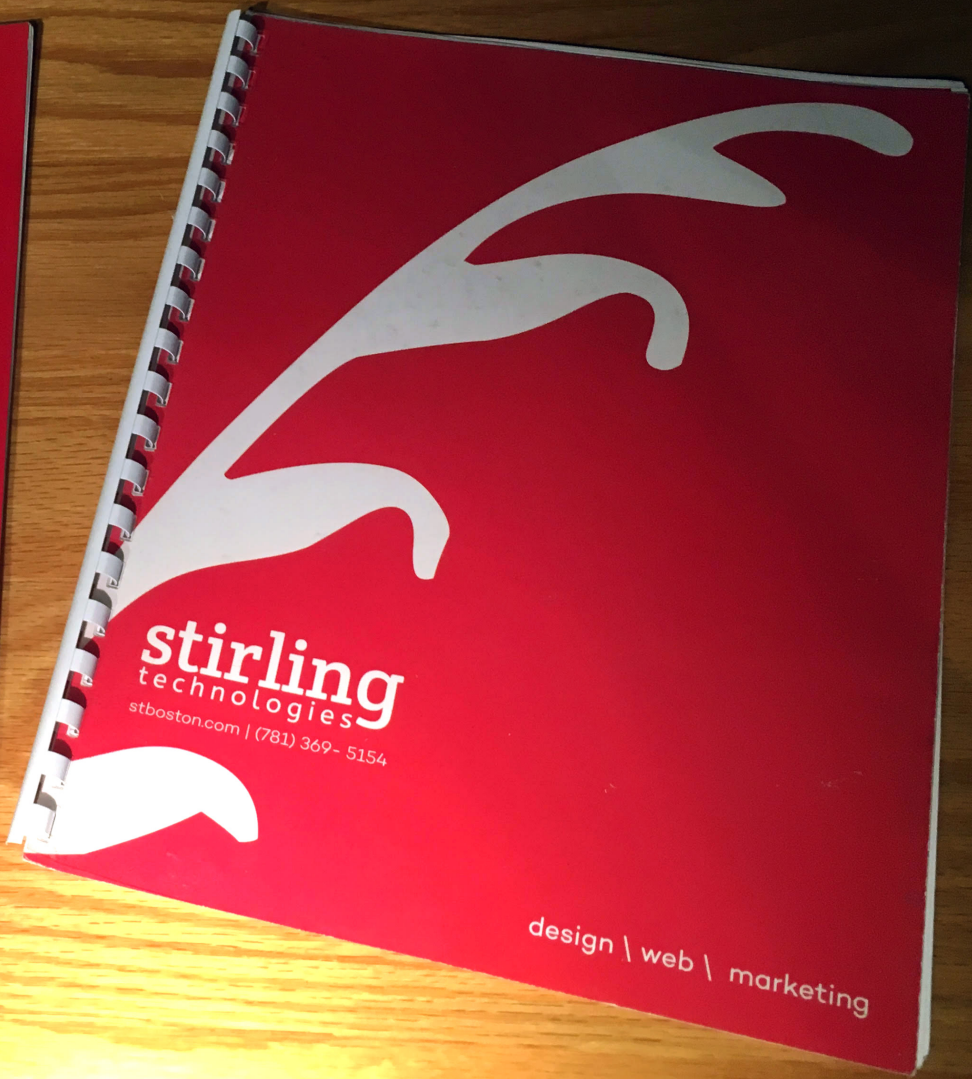
- Sell the ongoing relationship
- Start the relationship with a detailed proposal
 - How you're building it (custom, template, etc.)
 - How do you charge (Hourly vs. fixed fee arrangement)
 - When you expect to be paid (Milestones and payment terms)
- Outline project management and communication plan





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YOU DREAM. WE DESIGN.



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design | web | marketing



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SERVICES

Search Management	07
Security & Support	08
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PROJECT PLAN

DESIGN & PLANNING

Discuss collaborative **design process**, establish project goals, review navigation elements and brainstorm desired look and feel.

DESIGN ELEMENTS

- Colors, Fonts & Target Audience

CONTENT & CREDENTIALS

- Logo, Photos, Written Content or Outline Content, Artwork, & Domain/Hosting Information

SITE PLANNING & SITEMAP

- Navigation, Site Hierarchy

SEO OPTIMIZATION PREPARATION

- Preliminary keywords, establish goals & Target Demographic

1

2

DEVELOPMENT

Development and building of the site's beta version including **requested features and functionality**.

3

REVEAL

Beta website launch
Reveal of the beta website
Provide initial feedback

+

REVISION

Submit tickets to revision system
Unlimited tickets for up to **14 days**
Identify opportunities for content expansion and growth



Revisions can be submitted via the widget on the beta site, email, or at support.stboston.com

4

LAUNCH & TRAINING

Appropriate Training Materials Provided
Speed and Performance Testing
Cross-Browser and Device Testing
Branding Sheet provided
Color hex values, fonts, font-size, etc, established on new website
Local Listings Review*

SEO Review
Review Applicable Documentation, Training Materials
Review Ongoing support options
E-Mail Setup*
Identify KPIs*
Hosting Migration*

* (if applicable)



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



A close-up photograph of a person's hand holding a white rectangular sign. The person is wearing a grey suit jacket and a striped tie with pink and grey diagonal stripes. The sign is held in the center of the frame and contains the text "The customer is always right" in a black, sans-serif font. The background is slightly blurred, focusing attention on the hand and the sign.

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

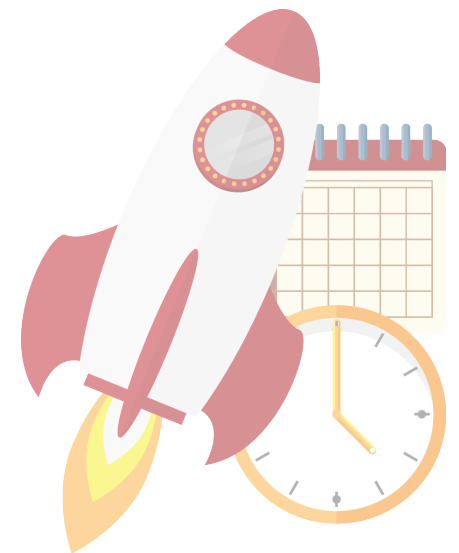
- Avoid icebergs
 - Dealing with delays and timeline
 - Addressing client feedback and revisions
 - Sticking to your scope of work
 - Police clients homework
 - Content (Migrate, develop, wait)
 - Outline next steps





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
Communication
 - Look forward to next phase to transition them to an ongoing relationship





**ONGOING
RELATIONSHIP**

A meme featuring a close-up of a man with glasses and a light blue shirt, looking slightly to the right with a serious, concerned expression. The background is a blurred office setting with another person in a light blue shirt visible in the distance.

WEBSITE IS DONE!

**FALSE. A WEBSITE IS NEVER
"DONE"**

A romantic scene in a hallway. A man and a woman are silhouetted against a bright doorway at the end of a long, narrow hallway. The man is leaning in to kiss the woman on the cheek. The hallway walls are made of large, textured stone blocks. The floor is polished and reflects the light from the doorway. The overall mood is intimate and hopeful.

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
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"YOU'LL FIND A NUMBER OF FREE TOOLS ONLINE. I'M NOT ONE OF THEM."





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