

FROM CLIENT LEAD TO PROJECT LAUNCH

The secret to
entrepreneurial
self-confidence!

Want to wow your clients *and* set your design projects up for serious success?

Establish clear client expectations and set beautiful business boundaries with a powerful client onboarding system!

Some folks think client onboarding doesn't start until your client signs on the dotted line. **That's like teaching your kid to drive *after* you gave them the car keys - too little too late (and now you have to do some serious damage control - oops)!**

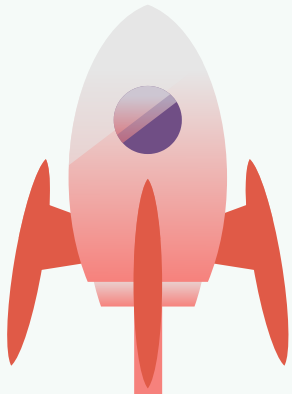
If you've been letting your clients run your business - don't worry, it's *not* too late! Let's look at how building a powerful onboarding process can not only help make sure your clients understand what you do and who you do it for, but also teach them what it means to be a great partner in the design process, starting the moment they land on your website!

Do this right, and by the time they sign that design proposal they'll not only be eager to say "Yes!" - they'll also be prepped to be fantastic clients!

Let's do this!



**A Seriously Happy™ Guide
For Interior Designers**



WHAT IS ONBOARDING? (& why should you care?)

What is it? Onboarding is the journey your clients go through from when they first find you to when they say "Yes! I want YOU as my designer!" But...

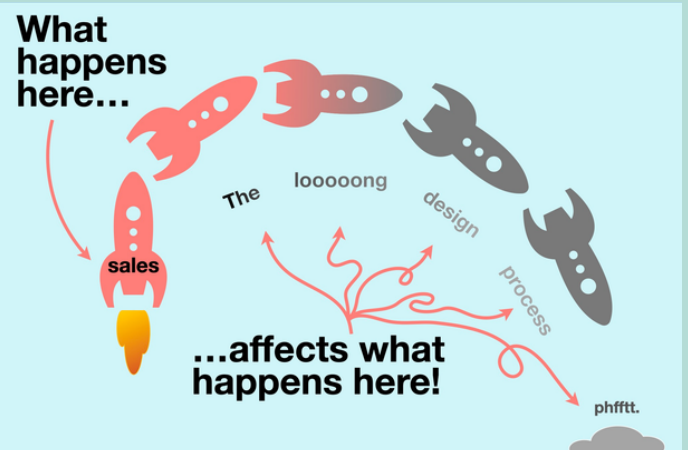
It's *NOT* just about getting folks to sign on the dotted line!

Just as important as getting to "yes" is making sure that – by the time you're signing your agreement and kicking off the project – everyone has the *same expectations* about what is going to happen, who is responsible for what, and by when.

Why does it matter?

What happens during the onboarding process doesn't just affect how likely that prospective client is to hire you.

It also affects how well the project goes after kick off.



We designers complain all the time about bad clients.

What we don't realize is that we often create our own monsters, just like Dr. Frankenstein! 🧛‍♂️

The great news is that you have waaaay more influence over this than you might think! And it's your onboarding choices that will help you build better clients and set your projects up for success!

Simply put, onboarding is the difference between "getting" a good client and creating a GREAT client!

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What does your client want?

When your client lands on your website, they just want to figure out if *you* are for *them*.

They're *hoping* they found "the one" and the first job of your onboarding process job to help them confirm that as quickly & clearly as possible!

Your client experiences 4 key **Milestone Moments** during the journey from curious to committed...



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What do YOU need?

While your client is trying to figure out if you are right for them, you should be doing the same thing, making sure *they* are a fit for *you*.

To do that, you have to guide them through their Milestone Moments and make sure to establish clear client expectations by *effectively* using your 4 key Onboarding Tools:



The Designer's Journey from hopeful to hired

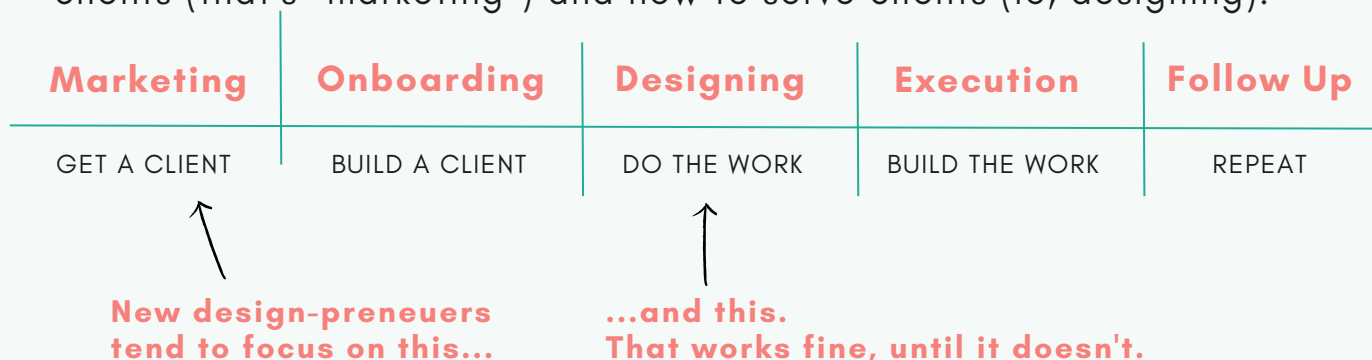
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Don't have a clear onboarding process? You're not alone!

Few designpreneurs start out with an onboarding plan. That's because when we start our careers we're busy trying to figure out how to get clients (that's "marketing") and how to serve clients (ie, designing):



Without effective onboarding, clients start projects on a foundation of misinformed assumptions. Then, as the designer, you end up explaining, corralling, and retraining your client right when you should be focusing on creating fantastic designs! Why add these unnecessary obstacles to your success?



Without a powerful onboarding process:

- ✗ We erode client trust because we don't lead with confident authority.
- ✗ We fail to gather the info we need to properly estimate our time, then exceed our estimated design hours.
- ✗ We waste time explaining our process *after* the project has already started, and struggle to keep projects on time, on budget, & on track.
- ✗ Our clients run the show, changing our contracts, rescheduling randomly, texting at all hours to send us whatever they found on Wayfair...



But once you build your powerful onboarding process, then you can:

- ✓ Feel confident your clients know what you do, and what to expect!
- ✓ Establish clear business boundaries.
- ✓ Make it possible to keep projects on time, on budget, & on track.
- ✓ Make marketing & sales soooo much easier!



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Really, this whole onboarding thing is just a clear conversation between you & your client:



If you lead this conversation well, then by the time you sit down to craft your Irresistible Design Proposal all you have to do is reflect back what they said they wanted in their intake form and on the initial consult, layer in what you know about their project wishes and limitations, and finalize a fair price.

Seriously - by the time you send the proposal there shouldn't be any surprises. Your client already knows if it's a yes.



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So what's next? Let's pause & think!

What are one or two expectations you have that clients always seem to misunderstand? When do they start asking about it? How could you cue that expectation earlier in your onboarding journey?

Do your service packages make it easy for folks to understand what you do, and what they'll get? Can you make that any clearer and easier to understand?

Can you effectively and concisely answer the following questions? (Practice with a friend until it comes naturally.)

What do you do and who do you do it for?

What will I get if I hire you?

How is that different from what I might get if I hired a different designer?

What do you need from your clients in order to deliver the best outcome?



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Milestone Do's & Don'ts

1

Your Website & Marketing Message

DO: Make a clear, consistent promise that emphasizes your unique expertise, talents, skills, background, and personality. Signal what it looks like to work, and what you'll need from your clients. Establish why YOU are the one for the job!

DONT: Use generic words that could be copied & pasted from another designer's website.



Having trouble figuring out YOUR promise?
Check out my [FIND YOUR NICHE 5-Day Challenge!](#)

2


Your Intake Form (& Discovery Call)

DO: Ask questions that draw in great-fit clients and weed out bad-fit clients. Be firm & disciplined about saying no to bad-fit clients.

DONT: Be afraid to make your clients invest a bit of effort and thought before asking for your time.

3

Your Initial Consult

DO: Come prepared with your essential initial consult questions. Build trust with your client by expertly guiding the process. Don't leave without the information you need to price (& accept) the project – if you can't get it out of your client, that's a red flag! 

DONT: Give away free design advice.

4

Your Design Proposal

DO: Reflect your client's language back to them. Capture the dreams and limitations of your project scope. Establish clear expectations around client input, deliverables, the project timeline, and payments.

DONT: Change your process for each client.

(Yes, I can teach you
how to do all of this!)



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I know you've got this!

Building a business takes a LOT of thinking and involves a LOT of experimenting! If it feels like you take 2 steps back for every step forward, don't worry! You're not doing anything wrong - this IS the design-preneur journey.



Think hard about your niche and your Service Promise - the more specific you can get, the easier it'll make *every other step in building your business!*

At the same time, don't overthink it. I promise you can pivot your brand later if you need to (I rebranded 3 times in 15 years, and each rebrand just leveled up my company!).

Still not sure where to start?

➡ **You've GOT to nail your niche!**

Nailing your niche is the key to EVERYTHING. It makes it possible to land the best clients. It makes sales a billion times easier! It helps you avoid wasting your marketing money and energy. And (of course) it's the foundation of your powerful onboarding process!

If you're ready to finally get clear about what you do and who you do it for, and if you're eager to start onboarding awesome clients, come join the party at:

seriouslyhappy.com/nailyourniche

NAIL YOUR NICHE 5 DAY CHALLENGE

When you're ready to get clear about what you do and who you do it for.



About me:

When I started my interior design biz in 2007 I was *determined* to wow my clients with my expertise and *obsessed* with being seen as "professional." The problem? I didn't actually feel confident. In fact, every time I signed a new client I'd run to Taco Bell to hide my feelings behind a Crunchwrap Supreme (or two).

But once I got my business back-end in order I discovered the REAL secret to confident success. Now I'm here to help you get there faster, and with fewer side quests to Taco Bell (*wink*). Come find me at seriouslyhappy.com or on IG: @beseriouslyhappy

Remember, I'm just a Zoom call away.

You don't have to power through this journey alone!

♥ *Rebecca*