



"Just wanted to say thanks so much! I downloaded the forms today... they are just wonderful! I can see that you have fine-tuned them over time to what they are today... The Estimate Worksheet alone is worth the price all by itself." - *Gail Miller*

## About Us

## Contact Us

# From Contact to Contract

BY PATTY J. AYERS

Potential clients are going to call you. They're going to email you. They're going to ask about having a website designed and built. Sounds good so far, right? But are you ready to respond professionally and effectively? The way you handle communications after your initial contact with a potential client can make all the difference in whether or not you end up with the kind of business you need and want. And it's very much up to you to be prepared and to manage this part of the process.



# Managing a WordPress-Based Web Design Business

## Finding the Right Clients

## What Should I Charge? Finding Your Own Right Answer

## Estimating a Website Project

## From Contact to Contract

## Show Me the Money: Getting Paid

## Backing Up Your WordPress Site

## Choosing a 3rd-party WordPress Theme

You might answer that you're going to give it everything you've got and try to "sell" them on hiring you to produce a website – and that's one way to look at it. But I think it's a short-sighted viewpoint, and I'm going to suggest a different approach.

Naturally, you want business. You want clients! But not every client is the kind you want to work with. So what do you really want?

Well, I can tell you, because it's the same thing we all want. You're looking for clients whose projects are within your areas of expertise and strength, who are willing and able to pay what it will cost you to give them what they need. You're looking for clients with whom you can communicate well. These are the projects that will allow you to shine, build you a great reputation, and pay your bills. These are the projects to keep your eye out for at all times.

Let's look at those three factors again:

- Projects within your areas of expertise and strength
- Clients who are able and willing to pay what it will cost you to give them what they need
- Clients with whom you can communicate well

The closer a project holds to this standard, the more you and your business will thrive and succeed. If any of those factors are missing, I would strongly suggest that you are better off steering clear of the client.

And so, I'm going to suggest that your goal during the pre-contract phase of a client relationship is to keep your eye on this question:

*Is there some way that I can engage in a mutually beneficial business relationship*

Staying  
Organized

Client Juggling:  
The Fine Art of  
Managing Multiple  
Projects

Managing Client  
Relationships

Avoiding Scope  
Creep

Design drafts and  
client feedback

The Client's  
Content: Getting  
Your Hands On It

Making Good Use  
of Plugins

Social Media  
Integration Basics

Training Clients to  
Use the  
WordPress  
Dashboard

Providing  
Maintenance and  
Support

Finding Help  
When You Really  
Need It

Staying Current:  
Continuing  
Education

*with this person?*

As I talk with a potential client, I focus on gathering information about their business and their plans and goals for a website. I try to find out something about the organization itself – will the person I’m talking to be the one I work with on the website, or would it be someone else – or even the dreaded committee? If the subject of money doesn’t come up naturally, I take a deep breath and bring it up, usually asking, “Can you give me a general idea of the budget for the website?”

During all this conversation, I’m doing two things: (1) writing absolutely everything down, and (2) getting a feel for who this person is and what it will be like to communicate with him on a daily basis for weeks or months. And mentally, I’m trying to answer that crucial question: can I turn this into a profitable, positive exchange?

Most clients have some kind of idea of the website work they need and want. But even if they are convinced they know exactly what they need, your expertise is still needed, and you should guide the process forward.

**RELEVANT  
WORDPRESS FREELANCER FORMS**

*01A\_Short Questionnaire*  
*01B\_Long Questionnaire*  
*02\_Website Specification*  
*03\_Estimate Worksheet*  
*04\_Proposal Letter*  
*05\_Website Development Contract*  
*06\_Contract for Hourly Work*

So this process of determining whether there’s a potentially happy business exchange possible here includes not just information gathering, but actually shaping the client’s vision into the best plan possible. He may contact you with a plan that initially appears to violate all three of the bullet-point-factors above, and yet you may be able to steer his plans towards

something which turns the project into a winner for you both.

Make the process into one in which you and the client share information and ideas until it becomes clear whether or not you can be of service to him. Look for that mutually beneficial project amongst the thoughts and plans. There will be times when it just doesn't seem to be there, and that's okay. If you handle the communication well, the potential client will go away with a great impression of you, and may very well tell five of his friends that you're knowledgeable, helpful, and great to work with.

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