

Ep #23: Managing Client Expectations



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With Your Host

Rachel Cannon

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Welcome to *Loudmouth Introvert*, a podcast for helping creative introverted entrepreneurs thrive, despite living in a world that's designed for extroverts to succeed. If you're ready to make more money and build the creative business you've been dreaming of, you're in the right place. I'm your host Rachel Cannon.

Okay, first of all, we made it y'all. It's March. Does anyone else feel like I do - that January and February are where the year is testing itself out on us, but March is when it feels like we're fully in a new year? I'm always relieved when March rolls around because it typically means (in my industry) that clients are ready to start some new design projects and things get into full swing for us. It's an exciting time of year - much more exciting than January with its gray, overcast skies that last much longer than its 31 days, and February, with its blink-and-you'll-miss-it with a holiday or two thrown in for good measure. No. March is a solid month. Weather starts changing, flowers start blooming, it just feels like the beginning of something new. Maybe March should be what we consider the start of a new year!

For those of you who have already signed up for my workshop, it will be! I'm teaching a live, virtual workshop on March 10th and 11th called 6-Figure Secrets for Creative Introverts, and it will certainly give your business the boost it needs to be successful in 2020. I chose March specifically for all of the reasons I listed above - I just don't feel like January or February are conducive to fresh ideas, so on March 10th and 11th, this workshop is where you want to be. Building my business was one of the best things I have done in my life so far, and I'm extremely proud of it. I want you to know how it feels to reach your financial goals and build your own successful business. I'll be teaching on the foundational systems and specific tools I used that propelled my business from so-so into an amazingly profitable company that I love. And of course, this will all be taught through the lense of our creative, introverted needs. No suggestions that will make you squirm, I promise! I refuse to be just another voice repeating the same business consulting advice we've all heard a million

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times - that is all geared towards helping extroverts succeed! If you're ready to jumpstart your success in the next 90 days, get off the fast track and into a pace honors your bandwidth, and form lasting, repeat relationships with your clients, this workshop is FOR YOU. You can register now at rachelcannonlimited.com/workshop and get ready to learn in a way that respects your unique temperament as an introvert!

Now, before I begin the show, I want to read another Loudmouth Letter. This one is from ccgall and it's called My New Favorite: "Where do I even begin?? I love this podcast. Rachel is amazing and her storytelling and examples are spot-on. Throw in her humor and the entire series is worth the price of admission (which is free). Keep up the great work, Rachel!" Thanks, ccgall! I will!

The reason why it's important for me to share reviews and Loudmouth Letters with all of you is because we're building a community. If you're following me on Instagram (@rclinteriors), you've seen me ask for your questions that you need answered here on the podcast, and so today's topic was suggested to me on Instagram by Ellyse Wilhelm, who asked "As an introvert and people pleaser, how do you learn to manage client expectations?"

Ellyse, this is a wonderful topic because I think many of us - especially women - have this question. It's all the things that plague us, right? Introverted, creative, people pleasers getting derailed from focusing on our work to manage clients can often leave us feeling drained of energy and creativity. When a client goes rogue, we can feel like we've lost authority, which puts us in the position of being yes-men.

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Why is that such a big deal? I mean, if you're still getting paid to just tell the client yes to everything they want, why complicate things? Well, you know why. Even though we might be people pleasers, we also want our work to be meaningful and fulfilling. When we step out of the role of expert, and into the role of people-pleaser, we know our true talent and skill is being wasted. And that feels worse than just about anything, because deep down, we know we're meant for a bigger purpose than that and we want something more significant than that.

So while we know we should try to manage client expectations, we often resist it because we assume they will think we're being controlling or rude. Especially when something goes awry in the middle of a project. Who wants to project an image of being easy going and then suddenly flip the script and be the one to put your foot down? So many people will be upset, and that makes our work even more difficult! This is how we get into that yes-man position, so today, we're going to talk about how we can manage client expectations in a way that's a win-win for everyone.

Here's the number one thing you need to remember about managing client expectations: it's really about managing YOUR expectations of them. If you can't articulate what you need from your client, how will they possibly know that they've gone rogue? We've talked about this before - clients often think they're helping the process by doing what they see as collaborating - when in reality, their efforts are holding up the entire process. Then they get frustrated because they feel like nothing is happening, and - boom - there you are in people pleaser land again. So while this topic is about managing your clients, it really comes down to you identifying what you need from them first.

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So, start by making a list of rules for your clients. Pretend they will never see it, and write down everything you need them to do and not to do. The purpose of this exercise is not to be a tyrant! It's so you can shine a light on the way YOU work best, and often it's easier to describe how something shouldn't work than it is to describe how it should work perfectly. Don't edit yourself. Don't judge yourself. This is your opportunity to list every little nit-picky pet peeve you can think of. You'll have your own list, but to get you started, here are some common things introverts find to be distracting or a hindrance in their work:

- Talking on the phone
- Texting
- Micromanagement
- Ideas are constantly met with criticism
- Constant interruptions
- Expertise and experience called into question

Spend some time creating your own list, and in fact, it might be a good idea to keep a running list on the notes in your phone or in a notebook, so when you encounter another pet peeve, you can jot it down. I'll explain how you'll use this list in a minute.

Now I want you to think about your exceptional skills - beyond just the creativity you bring to the table. Introverts are persistent, we love learning, we're self-starters, we work independently. Have you considered how you will communicate those types of qualities to your clients? Remember,

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creatives are stereotyped as being flaky, unable to manage their time, and ill-equipped to finish tasks. I know, it's not fair, but this is the reputation we're up against. What have you done to inform your client that that is actually the opposite of how you do your best work? Have you done anything to tell them?

Like many of the topics we've discussed here, the client is not at fault. We like to blame them when things go wrong, but many times, things go wrong because we've skipped some key communication altogether. And you can't blame the client for doing something that disrupts the process if we haven't been gracious enough to let them know how the process is supposed to work!

So now that you have your list of rules for the client, and your list of exceptional abilities, you need to marry the two and put together your ideal process. This is the framework you'll use to communicate what is expected of them. The great thing about doing it this way, though, is that it shows them up front that your process functions this way so that they can get the best possible result - it truly exists for their benefit, not so you can be on some egomaniacal power trip.

It's vital for you to communicate to them HOW you work best, and the only way to do that is to lay out some guidelines up front. For instance, you've heard me say more than once that when I allowed clients to text with me, I was a frazzled, exposed live wire, ready to combust at any moment. It really was as simple as just letting them know that our company policy is not to text with clients (and also to let anyone on our extended team know, too - like contractors, installers, etc.). Think about the parts of your job you enjoy most. For me, it's research, writing, thinking, playing with fabrics. What parts do I not enjoy? Rejection, bookkeeping, ordering, etc. It was a

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game changer for me when I was able to let clients know I don't do those things anymore so they wouldn't pepper me with questions about them. This was just the beginning of how I could manage their expectations! What drains you? (Constant requests for updates, which impede your ability to actually do your work? Clients who assume this is a hobby for you?) Write them all down, and then create a path for the client to get what they want (information and attention) in a way that doesn't suck the life out of you.

You can put together a document that outlines how you work, who they should direct questions to, the best way to reach you, and the WHY behind all of this - because you want to provide them with the best possible experience. You could even have fun with it and make a list of do's and don't's with some very extreme suggestions, like "DON'T throw things at your designer/DO send us an email when you have a question" - people appreciate a little humor now and then. The most important thing, though, is that you TELL them. In whatever form it takes - whether it's a fun marketing material, a separate meeting over coffee, or even a cute welcome video. You have to do what you can early on so you don't end up back in people pleaser land, with your great ideas going to waste!

When we talk about a topic like managing client expectations, which we now know is really about managing OUR expectations, we can't lose sight of the fact that we are introverted, creative entrepreneurs. What we need more than anything is balance. Yes, I know, this is a buzz word that has lost a lot of its meaning, but what I mean by that is - what are we doing to honor both our temperament and our talent? If you remember from Episode 22, your introversion is actually encoded in your DNA, and there is no "growing out of it." So for me, that means I can't have a full day of back-to-back meetings. I'll be so tapped out by the last one that those clients will get the leftovers of my creativity and energy - if there happens to be any of either left! Balance for me is knowing my limitations, determining how I can be my best, and then structuring my days and activities around that. So for

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example, we don't take appointments after 3pm. I need those last couple of hours of the day to wrap up tasks, and having a quiet environment helps me do that. A lot of times, I write and record podcasts during those hours. Having to be "on" will wear me out - so structuring some time to go into a quiet place in my day before I go home helps me start decompressing long before I actually walk through the door of my home.

And all of that leads me to this: knowing the rules for your clients, knowing your exceptional abilities, knowing your ideal work flow, and structuring your days so that you can function at your highest, most creative self - all of that needs to be part of your marketing and client intake process. And that means the responsibility is once again on you to VET your clients before you say yes to working with them. Many creatives are just looking for the wealthiest, highest profile client they can find because they think a big budget will equal a big payday for them, and that will ultimately solve all of their problems. At this point in my career, I'm less concerned with wealth and more concerned things like: are they disrespectful? Are they micromanagers? Do they seem entitled? Are they into unnecessary drama? Are they unwilling to allow me autonomy to be creative? If there is a check in even one of those boxes, then it's a no from me. Other red flags would include: do they seem to have bad attitudes or talk badly about other professionals? Do they seem like know-it-alls (a great conversation about design could just as easily be an indication that this client just wants an assistant)? Do they follow my intake process without acting out? Do they understand how I work?

Since we are up against the creative stereotype, it's on us to make sure clients know how we work best. As introverts, we already know that if we decide to invest our energy in something - our work, our clients, the final product - then we have a deep belief that it will be worth it. So, it is crucial that you give yourself permission to be an introvert, and make sure the client understands what that means from the beginning. Offer clear paths

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for them to get what they need from you without derailing the process. Remember, you can't blame them for not knowing what you didn't tell them!

Managing the clients' expectations is really about managing YOUR expectations of them. Establish how you work best, how you deliver your service or good at the highest level, and communicate what that means for both parties.

And if this podcast has resonated with you at all, remember to register for my live, 2-day virtual workshop, 6-Figure Secrets for Creative Introverts at rachelcannonlimited.com/workshop

I've tried to make it as easy as possible for you, so this is a 100% virtual workshop. That means - no travel, no commute, no plane rides or overnights in a dodgy hotel. Stay in the comfort of your own home and meet with me and other workshop attendees through the video on your computer. You can even wear your pajama pants! No one's gonna know! I might even wear mine!

Best of all, attending this workshop will give you the tools you need to create meaningful work by maximizing your earning potential, use your unique temperament and characteristics as a business owner, and develop lasting connections with your clients. You have 4 days left to register, so go to rachelcannonlimited.com/workshop now and reserve your seat! Hey, y'all, if you love the show and you find it useful, I would really appreciate it if you would leave me a rating and a review on Apple Podcasts, or iTunes if you're an Android or Windows user. Your feedback helps other creative introverted entrepreneurs find the show and it helps me create an awesome show that provides tons of value.

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