S01E28 - Rai Hyde Cornell

📦 Sat, 6/4 11:09AM ⏱ 27:57

SUMMARY KEYWORDS

clients, work, revisions, project, process, contract, approval, seo strategy, payment, create, pay, happy, agreement, business, cornell, invoice, proposal, easier, website, feel

SPEAKERS

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Welcome to the SOAR Podcast the place for creative entrepreneurs with limitless dreams and unconventional stories. I'm your host, Ray Hi Cornell, founder and business mentor at chyron consulting and CEO and senior copywriter at Cornell content marketing. My goal is to bring you stories of what's possible, so you can never tell yourself that your dreams are impossible.

Rai Cornell 00:29

Hello, hello, hello, Ray. Hi, Cornell here. And I am super excited to be bringing you the last episode of season one of the SOAR podcast. And this topic is one that probably maybe feels a little mundane, but actually, I love it because it makes your business, your life your interactions with clients, even your sales process so much easier. What is it? It's designing your perfect process and wowing your clients? So let's get into it. one of if not the biggest fears for freelancers is, how do I get clients? How, how am I supposed to do this? How am I supposed to get people to pay me for my creative work? There are a few things that you need. One is a portfolio with at least three examples of your work. And they don't have to be paid test projects or like paid commissioned projects. I'll go I go more into that in the free guide to or what is it? Oh, goodness, I wrote it, I should know the name of this, the complete guide to building a successful freelance business, you can get that on the website. It's a free download, it's got tons of information in there, it actually walks you through step by step the process of building a successful freelance business all the way at the beginning, you will find the process for building a portfolio even if you've never been paid to do the work that you want to do before. Okay, so a, you need a portfolio of at least three examples of your work be you need a way for them to easily get in touch with you. Hello, zoom, hello, phone, hello Calendly booking system easy and see you a clear process that shows them that you know what you're doing that they will be in good hands. And then in this episode, we'll be talking about that last piece of the puzzle, your process and how to make life for you and your clients easier. Let's get started. All right. So what is the purpose of a process, you don't need a process just to have a process you shouldn't make it overly complicated for yourself or for if you have a team for your clients. There's no point in overcomplicating things when you don't need to. So why why even take the time to write out your process and create one, it actually makes your life easier, first and foremost. And

this should be a big litmus test as you're going through this process. And ironically, if you are going through this process to create your creative process, that's what I want you to be focusing in on, is this going to make my life easier? Or is this going to be a pain in the ass, if it's going to be a pain in the ass, it doesn't belong in your process. Or if it absolutely has to be in your process, like getting clients to sign a service agreement, getting them to pay their invoice, maybe that's something that you should be handing off to a team member. The other purpose of a process is to make your clients life easier. You are a problem solver. After all, that's why they're hiring you they have a problem, you have a solution match made in heaven. Your process does both. Now, how do you create your process? I want you to actually imagine this. Imagine that you have a client. Imagine you've already gotten through the paperwork part of it all, we're going to come back to that later. And now you're at the project stage. What do you need in order to do your job? In what ways do you want to interact with your client? How much time do you need?

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All of these things are supposed to make your life easier. So for example, when I'm starting to work with a new client on the Cornell content marketing side, and let's say they want me to write a brand messaging guide. I do probably one of these a month or so there are certain things that I need to know in order to write that guide. And I have an outline of a guide that I create and I create the same sort of sections for each client. They all need a company overview they need to know who their client is they need to know why they're doing what they're doing their core values, their brand archetype, their mission statement. They need to know all those things. So I'm Know that there are specific questions that I need answered from my client in order to write those sections. So what do I need in order to do my job, I probably need a phone call with them, I need a zoom call, some sort of call that I can record usually takes about an hour. And I need to pepper them with these questions. Then, in what ways do you want to interact with your client? Do you prefer phone over zoom? It's okay. A lot of people are finding that yeah, they actually prefer phone nowadays, over zoom, because zoom fatigue is real. We all get tired of staring at each other with incessant eye contact for an hour at a time before hopping to the next one. It's okay. If you want your process to involve phone calls. When I do content interviews with my clients, I always tell them, hey, this is going to be a phone interview, no video just going to, you know, have us on our cell phones, whatever. And because if we're on Zoom, all you're gonna see is the top of my head while I'm taking notes. So there's really no point I just need to listen to what you're saying. I'll take notes during the process. And I just need you to feel free to open up your brain and give me the information. And then how much time do you need? How much time do you need for this project? Do you need a week, two weeks a month, be honest, and then add some extra time. If this is like a two day sort of project, give yourself an extra two days, if this is a one week project, give yourself two weeks, this is a two week project, give yourself four weeks, there are always going to be unexpected things that happen. And it's better to ask for four weeks and deliver in three than to ask for two weeks and deliver in three. Then how will you get your clients approval on what you've created. When we do blog content within the agency side of things. We have an air table editorial calendar, where we have all of the topics the keywords the kind of like prompts for the blog's that we're gonna write for our clients, we have the document link, and we have a status. Now we set the status to ready for approval. Our client goes in, they read the blog, if they want some changes made, they change the status to revision request. If they approve the blog, they change the status to approved. And airtable keeps a nice little history of who changed that status. That is our sign off process. You can use other sign off processes like getting an email confirmation. Hey, so and so? Do I have your approval on that marketing email that I wrote for

you? If you're happy with it, then I'll consider this project wrapped. Let me know what else I can help you with? How will you get that clients approval? It's very important to do in order to protect yourself contractually. But it doesn't have to be a complicated process. And then what do you do if they're not happy? What will you do? How are you going to make that right? And at the same time, how will you protect yourself from clients who want so many revisions that this is basically turning into an entirely new project. With everything that I offer on the Cornell content marketing side, we always offer two rounds of revisions. And I get very clear about the fact that a two rounds of revisions are included if they're needed. I always say if needed, because I don't want people thinking we have to use the two rounds of revisions. Some people look at the list of what's in your scope of your project. And they go okay, I need to use every single one of these things. And they literally will even if they don't actually need revisions. So if needed. Also, I Oh, shoot, I lost my train of thought there. Hang on. Oh, yes, there we go revision process. The other thing is, I will let them know, Hey, if you are going to be doing approval by committee,

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we need everybody who's going to be reviewing the content to give their input before one of those rounds of revisions will begin. Because if they're going to have four people look at it. I'm not going to make one round of revisions after person A and another round of revisions after Person B and then Person C and D come back and have to make revision rounds three and four. No, they only get two rounds. So persons A B, C and D give their input. I make the revisions, then they can look at it again. And I very rarely maybe like once a year. Do I ever have clients use that second round of revisions, because I have that lovely if needed subtlety language. But if they do then One scan, everybody by committee looks at it again, doesn't mean they have to all look at it as the same time that Person A says, Okay, I've added my notes handed off to person B and so on. And then I make those revisions. And then lastly, how do you get their sign off approval? On those revisions? It's exact same process is how you did it before? How did you get their approval on that logo you designed for them? Or those gallery images that you are? I'm sorry, the gallery of images that you took for them as a photographer? How do you get their approval? That is your process from start of? What do you need in order to do your job? If you're a designer? Do you need their color palettes? Do you need to know their fonts? Do you need a brand guide? Do you need to have a meeting with the head of marketing to discuss the vibe and personality of the brand that they're trying to bring to life? What do you really need, ask for that? Because not doing so will impede your ability to actually do the job. And it'll show your client, oh, you actually don't really have a creative process, it's good to ask for things, you just need to know what you need to ask for. That is your process. That is your creative process. Now, as a business owner, as a self employed creative, there are going to be things on the front end and the back end of that creative process. On the front end, you're going to load your process with protections. So what are those there your proposal, your contractor service agreement, and your invoice, your proposal serves to outline the scope of the project and get agreement on the pricing. I use dubsado I like to outline this is what you get with this package, select this item, if you like this, there's the price right there. And then it locks it into the system and dubsado actually creates the invoice based on what they've selected in the proposal. So there can be no miscommunication there. So your proposal outlines the scope of the project, and your pricing, your contract or your service agreement, I like to call it service agreement, it just seems less threatening, it seems less like you know, you're gonna have to hand over your firstborn child, then the word contract. So your service agreement, you need to get agreement from your client to your boundaries, your payment terms, and things like ownership rights. And there are a bunch of things that need to go into your contract. And that's a whole other topic

for another day. But your contract is where you can put things like, hey, if payment has not been received, by the day that we have our kickoff call scheduled, then we don't have our kickoff call, payment needs to be received before the project will actually begin. Or if this is a retainer agreement and payment is late, then we're going to add a 5% late fee that compounds weekly. That is literally the term in my contracts. That is my late fee policy. If this is a retainer agreement, and you've agreed to six months, what happens if they cancel early? How do they get out of their contract, you have to have a way of letting them out of your contract. But there also has to be a penalty for them getting out of their contract. Otherwise, what's the point of the contract? My contracts say that if someone wants to end a six or 12 month agreement early, they must pay 50% Of the remaining months in the contract. So let's say it's a $5,000 a month contract, we have a six month agreement, they want to cancel after month, four, meaning they have two months left, that would be $5,000 that I would make in month five, and $5,000, I would make in month six, that's $10,000, I would be out 10,000, they have to pay 50% of that.

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They have to pay $5,000 to get out of their contract. I know other agency owners who have a 100% buyout policy for their service agreements, you're likely going to be working on a per project basis. So let's say they decide to pull the plug on the project halfway through. That's what's called a kill fee, you need to have a kill fee in your contract that says, Even if this project is canceled, you get paid because you put in time, energy and effort and it was not up to you to pull the plug on it. And so you need to be protected. And then lastly, the final step of Oh, and then actually I wanted to mention ownership rights. So this is something that actually makes a lot of clients very comfortable. In my contracts. I always say at the end of the project, as long as all invoices are paid. They own everything that I have created for them. And that often goes a long way to making them feel like oh great. And then I'm happy to pay this because I get to own it. Even though that's implied in the relationship by actually detailing that in the contract, it makes clients very happy and sets them at ease. Okay, and then that third piece of the protections, your invoice, the invoice is the signal flag, it is the green flag, it is the feel free to take off sign that your project is officially underway. I highly highly, highly recommend that you require full payment on a project before getting started. And sometimes, if it's a client that I really, really want, and I know they can afford the services that I'm being contracted for. And so it's not a matter of do they have the money, but rather, it's a matter of making the client feel comfortable. And sometimes I will say 50% is due in order to begin the project. And 50% is due in order to receive the final deliverables. So you basically hold your final deliverables hostage, but in a very nice, gentle, polite way. Also, I will also say that I will make that offer only if they express some kind of uneasiness about paying in full, like, hey, you know, it's our policy to not pay contractors in full at the beginning of the project, because we've been burned before where some, you know, writers just take the payment and run. And I go, Whoa, that sucks. I totally feel you on that. That's awful. First of all, I would never do that. And second of all, I totally understand where you're coming from. I want to build trust here. So how about for our first month of working together, we do a 50% payment upfront and then 50% At the end when I'm ready to hand you off the final deliverables. And then we can switch to a payment upfront model for the rest of the months of our contract. How do you feel about that? And usually they go, Yeah, that's great. Because honestly, all they need is the proof that I'm not going to take the money and run. And so that accomplishes that goal for them. So your process, your complete process is going to be front loaded with those protections, the end of your process is going to be how do you turn this project or this retainer or this contract into more work with them? Now this hinges on one important thing? Do you enjoy working with this client? If you do

if you actually enjoyed working with the client, awesome. Ask them how the experience was for them to be honestly genuinely interested. Anytime I deliver something, and I get that final sign off, and they say, Hey, we're really happy with this brand messaging guide. We're really happy with the revisions. Think we're good on this project. I go Awesome. How was this project process for you want to make sure that if we continue to work together, if there's anything that could have gone easier for you, I want to know so that I can improve that for you genuinely ask, and then keep the conversation going. They will respond to that. And oftentimes they'll go no, you know, actually everything was great. Or, you know, I wish we had updates, you know, every so often so we knew where things were, they might give you a little feedback like that. Easy, you can implement that. And then go Okay, great. I will definitely keep that in mind for our next project. Is there anything else that you have in mind that you'd like to work on?

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Just segue the conversation right into next steps. If there's kind of a LoL or if you are struggling to build that bridge between project A and project B, there are a few things that you can kind of build on for example, how are they going to implement the work that you've done? Let's say that you're a designer. And you also have experience with WordPress. And they go awesome. We love this new logo. And you go, Okay, awesome. I'm super glad that you're happy with this. Do you need any help adding this to your website? Or do you have any PDFs that needs to be updated with your new logo? Do you have a sales deck? Do you have? You know, on the corner content marketing side, we do a lot of work with subscription boxes? Do you need your subscription box to be redesigned with your new logo? How are they going to implement the work that you've done? No, don't go into an area that you're not actually willing to go. So for example, if you're a designer with no website experience, and you don't even want to offer that service, don't go there. But if you are a designer who also does PDFs or can do you know product type Design for Print, then can you help them with implementing the first project that you did? If so, they're going to be much more comfortable having you do that since you're familiar with the graphics that you created. Next, is there something related That would make sense to work on next. So for example, I often do SEO strategies for our clients on the content marketing side, once they have an SEO strategy in place, what makes sense what's related to that? Well, you can use those keywords, you can use the strategy that I've created on your website content in your blog content. You can update your Facebook, your LinkedIn, your Google My Business Listings, you can update all of those online presences. So that's related work, do you need help with that, I'd be happy to help you take this SEO strategy and turn it into blog content that's actually bringing you inbound traffic, do you want to talk about that next phase of our work together? If you enjoyed working with the client, that's the way that you then take this healthy client relationship and turn it into more ongoing work. Of course, there are going to be times when you actually don't enjoy working with a client. In that case, it's no problem. All you have to do is tell them that you appreciate their business, and you wish them the best. If you don't want to leave the door open for more interaction with them than close the door. I have to do this probably every, I don't know three to four months, when there's a client who has snuck through my vetting process and who I just man, they were just too needy. Maybe they were kind of like helicoptering or they were just micromanaging me. Maybe they called me without having an appointment on my calendar. That's a big red flag for me. If that's the case, I don't want to work with them once the project is complete, and everything is paid for, say, Hey, thank you so much for your business, I really enjoyed doing this project for you, maybe not working with you. But maybe you enjoyed the work, say something honest. And go, I wish you guys the best. Thank you. That's it, that's all you have to say. You don't have to invite them for the next step. Once you've been working with a client for a while, and usually like to

do this at about three month mark, always ask them for either a testimonial or a referral, whichever one you need more. So depending on the client, and sometimes at three month mark, I'll ask for a testimonial. And then at the six month mark, I'll ask for a referral. But the way that you asked for this is, hey, I've really enjoyed our work together. I would love to attract more clients like you or I would love to work with more clients like you. Could I get like a one to two, maybe three sentence testimonial from you to put on my website and my social media. Yes, awesome, thank you so much. If you just want to type it into this email, that's all I need.

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And then if you want a referral, the conversation then becomes, Hey, I've really enjoyed working with you. In my experience, the best clients come from clients who I already have a great working relationship with, if you happen to know someone who needs the services that I offer, and you know, fill in the blank. So I would say if you know someone who needs help with their SEO strategy, or content creation or copywriting, I would love a recommendation, we actually have a few spots open for new clients starting in July. That's exactly what I would say. And most people really want to be helpful. And oftentimes they'll go actually, I was just talking with a friend of mine about this, let me put you in touch with him. Or, you know what, I don't know anybody right now. But let me think on that. And then they actually will. And the best clients come from referrals, because you already know that if you like the client who's referring that person, you're likely going to enjoy working with the person who they enjoy working with. So there you have it, you have your creative process, you front load it with protections, you backload it with more projects. That's it. And once you've detailed that out for yourself, I want you to create a distilled down version of that middle part. Well, actually the whole thing honestly, that you can explain to your clients. And you'll need that for your sales calls. So what I mean by that is, once you've detailed the process for yourself, and you know exactly what pieces you need, and when and, you know, for these types of projects, you need to recall these types of projects for these types of projects. And in today's whatever it might be, look, take kind of a zoomed out view of that process and go okay, so if a client is asking me what my process is, how do I explain this in about two to three sentences? And typically what I tell my clients is when we're, you know, at the end of a sales call and we go okay, so what are the next steps? How do we work together? I will say well First, I'm going to send over a proposal. If you like everything that you see in there, you know, if you have any questions, we can obviously talk about those. If you like everything that you see in there, go ahead and submit the proposal that will trigger my system to send you a service agreement and an invoice. And then once those are taken care of, we can schedule our kickoff call, I'll need about an hour of your time to ask you questions about XY and Z. I'll take about two weeks to put together this brand messaging guide for you. And then I'll send it over to you for review and revision. The project includes two rounds of revisions if we need them. Oftentimes, my clients just need one round of revisions, and we're able to get everything polished up in that process. But we have to just in case, and then if you're happy with everything, then we're all set. And we can talk about what more work might look like together if you're happy with everything I've done for you. And that's how I explain it to them on the call. Okay, that was bit more than two to three sentences. But that goes a long way to telling my clients I've done this before. I know what I'm doing, I have a process and that is the distilled down version of it. Now that is just one part of your sales calls. And I would recommend if you are uneasy about sales calls, if they make you feel nervous, and you just kind of bumble through them and you don't want to be too pushy and salesy, you don't know what to ask Next, check out my workshop called non sleazy sales tactics for creative entrepreneurs, you will learn my entire sales process, and it doesn't even feel like sales. It just feels like a conversation. It feels like a problem meets a solution. And everybody is happy. So

check that out. I will put the link to that in the show notes. Now. Go write out your process, test it, polish it on it. Practice explaining it just in that quick, simple way that I did. And relax into it. Your process is here to make life easier for you. It's here to make life easier for your clients. So spend some time thinking about what you actually need. Create that process and soar.

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Hey, it's Ray again. Thanks for listening. If you liked this episode, please subscribe and rate us on your favorite podcasting platform. We're on iTunes, Stitcher, podcast addict, YouTube and more and want to be a guest on the show or know someone who has an amazing story of entrepreneurship apply on our website at WWW dot Kyron consulting.us/podcast