

Google vs gut: how to screen clients



By Jo Duxbury

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Whether you're a big agency, or a small one, or a freelancer, chances are that when a new client starts nosing around, contemplating working with you, they'll do some background checking. After all, they're going to be giving you money and they need to know you'll be able to deliver what they order.

Funny, though, how rarely this screening happens in reverse.

We all want clients; we clamour for their business and bend over backwards to impress them. That's fine, but how about doing some homework to make sure that the client is (a) legitimate and (b) the type of client you want to work with?

Here's how I screen potential new clients:

1. Their manner - and manners

I recently had a client submit an enquiry form on our website. It included her name, phone number and email address but no note. I had no idea what she wanted so I sent a polite enquiry in response. She's been brusque and brief in our communication since - "Call me on Thursday. I'll be out so phone me on my cell." This sounds like I might catch her when she's driving, or having her highlights done - somewhere where she won't be focused on our conversation.

I realise our conversation will not be the top priority of her day, but I would like her to be 'present' when we do speak. On my List of Clients I Avoid are those who are high maintenance, rude, who treat me disparagingly or never say "please".

If we treat each other with mutual respect, then we can do great things.

2. I talk turkey early on

I usually mention costs in an initial meeting. In fact, I'd rather do this on the phone or email even *before* a first meeting. Because if our fees are way out of the client's ballpark, let's not waste each other's time.

3. I avoid the hagglers

While I am in my element bargaining in a souk in Marrakech, I feel strongly that it's bad business practice to ask for a discount on a first project with a new supplier. Give me large, ongoing projects and of course I will offer you a

discount, throw in some freebies or set up a special rate card for you.

But don't ask for a lower fee for a small project when I barely know you.

4. I walk away if they won't pay a deposit

We just met. You want me to carry all the risk in the hope that you'll pay me at the end? Sorry. No.

A deposit commits you to the project, and commits me to delivering.

5. I Google them

The interwebs generally won't tell me if a client is a bad payer or scope-creeper, but I can check out whether they're a legitimate operation or not. I Google both the company and any individuals whose names I know.

Sometimes I'll discover that we have LinkedIn connections in common, in which case I can make discreet enquiries to my network contacts.

6. I ask around

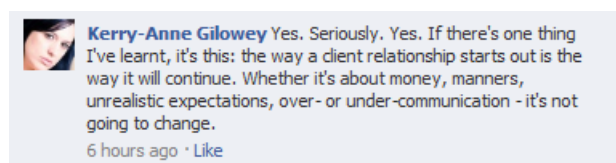
Thanks to social media, an innocent-looking tweet such as "Has anyone ever worked with a company called xxxxxxxx?" can uncover all sorts of skeletons. I've had a few narrow escapes, thanks to warnings from people in my network.

Be discreet and use direct messages beyond the first tweet.

From time to time at Freelancentral, we hear warnings of 'do not work for this client!' from our members. Tempting as it is, it's just not right to publish a list of blacklisted clients. But if you want to know about a particular one, just drop us a line and we'll let you know if we've heard anything bad about them. Off the record, of course.

7. Gut feel

I asked on Facebook recently whether I should trust my gut and run screaming from a prospective new client who has been raising red flags. The overwhelming response was, "Yes! Trust your instincts."



I always say that I've never regretted a decision I made based on my intuition, but I've regretted several when I ignored it.

8. Comic sans and typos

If there are grammatical errors in the reams of long copy on their Comic Sans emblazoned website, I won't work with them.

OK, I'm kidding. This usually means they **really** need my help.

Do you screen clients and if you do, how? Has your intuition ever let you down? I'd love to hear about your experiences in the comments below.

ABOUT JO DUXBURY

Jo Duxbury has been providing a platform for marketers to find thousands of industry freelancers since she launched www.freelancentral.co.za in early 2006. January 2010 saw her launch Peppermint Source, which offers a full outsourced marketing strategy and management service to companies that don't have the time, skills or staff to handle their marketing themselves. Jo is also a fine art, travel and portrait photographer - view her work at www.joduxbury.com or follow @JoDuxbury on Twitter.
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