How to say "no" to clients and prospects

Avoid burnout and make more recurring revenue

BY HANS SKILLRUD

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Today's agenda

About me

Hans Skillrud

I am the Vice President of Termageddon, overseeing sales & marketing. Before Termageddon, I ran a 12-person web design agency in downtown Chicago for 7 years, and sold it in March of 2019 to focus all of my attention on Termageddon. I enjoys bee keeping, hunting for morel mushrooms and walks with my wife and two dogs.

Assumptions

You simply want to help people.
You don't want to go broke.

Two main challenges of web design

1. Infinite possibilities in web design;
2. Client expectations exceed budget.

So why do bad projects happen in the first place?

1. Say yes because they simply want to help (or think you have to for some reason;
2. Say yes to pay the bills.

Let me propose two different principles for consideration.

Two different principles for consideration

1. Know what you offer. Say no to everything else.
2. Know to how to manage client expectations. Say no when the client wants more than what was agreed upon.

When you do say "yes" to non-ideal projects, communicate any areas of where you are uncomfortable.

VIII

Step 1: You have to figure out if what they need is what you offer

Define your Discovery process. This is where you need to have a list of questions you ask your clients to ensure you understand the scope. Here are a few to get you started:

- What functionalities are need? (Contact form, analytics, etc.)
  - How many web pages need to be made?
- Will customers log in anywhere? Do you want or plan to have an eCommerce website one day?
- Will training and support be needed?
- Do you have any subdomains?
- Is search engine optimization a goal for this website?
- What assets do you currently have in place?
- Who is writing the copy? Who is providing the media and image assets?
- Who will be the point of contact for your organization?

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- What are your plans to bring traffic to your website?
- What are your expectations after launch?
- What are your expectations for design?
- Is there anything else that I haven't asked about so far?
- What is your budget?
- Do you have any deadlines?
- If a deadline is required, are you able to provide responses to my communications within 24 hours (or a few hours depending on timeline!)?
- Are you okay using _____ project management software?

VIV

Step 2: You take measures to help reduce risk of a scope creep client

Develop a list of red flags:

- Are they an existing business?
- Do they have a website in place?
- Have they had any previous experience with a web design process?
  - If yes, what went well in the relationship, what needed improvement? What did you learn in that experience?
- Do you work another job and are only available nights and weekends?
- What is your budge?
- Do they attend meetings?
- Are they disorganized?

- Do they know what they want? Do they expect the website to magically drive in billions of dollars or revenue once launched?
- Does it look like they have no idea what makes up a proper website?
- Do they listen to you?
- Do they understand your process? Do they respect that process?
- What does your gut say about this project?
- After you share a quote, how do they react? Do they try and negotiate with you? If they do try and negotiate with you, what are they willing to let go project-wise to ensure both parties are impact with changes to the project quote.

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If the prospective project is not a good fit or the client failed your red flag test, it is time to say "no". You'd be better off using that time to find a more fitting project and client.

Just say "no" (respectfully)

1. Acknowledge your appreciation for the opportunity;
2. Decline the offer*;
3. Provide resources on where to go next.

*Pre-determine if you want to give a reason why. If you do, be prepared to defend that position. If you don't want to continue communication, it's best to be direct without sharing too much information. It is now time for you to seek other opportunities!

Conclusion

It's not fun saying no to business, because chances are you simply want to help people, make money, and learn a little bit too. Unfortunately, saying yes to the wrong opportunities can impact your well-being long term, as you reactively chase after business.

Determine what you offer and have a checklist to remove high risk prospects and clients.

Clearly communicate project deliverables as well as what's not included.

Decline bad fit opportunities respectfully and provide those individuals with alternatives.

In other words, fight for doing what you actually like doing!