

BANG Breakfast

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Initial Service Meetings

CPD 1 hr Formal - Practice Management

Online Booking System: How I manage new enquiries

By email or phone, I direct people to my webpage - Initial Service (IS)

<https://www.aaarchitect.com.au/architects-initial-home-advice-service.html>

7 things it does:

- 1 - It explains the process and what we do
- 2 - Shows the fee for this service (\$495 paid in advance)
- 3 - Links to a guide on 'why you should pay for a first meeting'
<https://www.aaarchitect.com.au/ask-architect-architects-first-visit.html>
- 4 - Helps me get rid of tire kickers and people who just want a check price or free advice to take to a draftsman / relative / friend etc.
- 5 - Enables people to book this Initial Service themselves online
- 6 - Allows me time to go through the brief and budget discussions in detail
- 7 - Provides the information I need to prepare a 'Return Brief' (quote, but I don't say quote because my fees are hourly rate with approx. ranges)

How it works:

- 1 - If it's agreed to move ahead with an IS, we agree a day and time first over the phone / DM
- 2 - They then book me online - using a login code that I give them
- 3 - This booking is just an email form, but it includes all the information in the booking form so it qualifies as a formal agreement. They are responsible for the brief and other information, and the email is their agreement and payment receipt.
- 4 - When the form is actioned, it will email us both. We trust the service is paid for the service.
- 5 - When received, we follow up with an email requesting a list of items that will allow us to prepare for the meeting, ie. sale contract with s10.7 certificate inside, survey, existing drawings, sewer diagrams or reports etc.

The service:

1 - Begins with some research online, real estate sites, google maps, online tools such as the ePlanning Spatial Viewer;

<https://www.planningportal.nsw.gov.au/spatialviewer/#/find-a-property/>

2 - We start a '7 Point Check';

<https://www.aaarchitect.com.au/architects-initial-7-point-controls-check.html>

3 - We may also call a bushfire consultant and get a likely BAL rating or investigate other issues

4 - We do the meeting on site, so we can meet our potential clients, see their property, discuss the brief, look at site issues and opportunities, like overlooking, overshadowing, and views

5 - We may talk about budgets, overcapitalising or whatever is specific to the project

6 - We give obvious initial advice, but no design work

7. The aim is to really clarify what needs to be done, knock down, renovate, sell, etc.

Our Retainer Agreement:

1 - Assuming there is still a viable project we then prepare an agreement, which is based off a standard format - in our case, hourly rate services with estimated stages

Key advice:

1 - Always charge for this service

2 - Always charge for this service, and automate engagement as much as possible

3 - Always charge for this service, and have them pay in advance

It usually takes 4 hours to complete, sometimes longer and my fee is actually a good deal for the client. Before I began charging - it was like going to the circus every 2nd time.

People value free advice less than advice they have paid for.

Tells:

Things people say and do that tell you, you're not getting the job:

1 - They shout you a guilty lunch: you are a check price / cheap advice

2 - If they say they are glad that you charge for your service - because they now feel less guilty dragging you through all this for a 'check price'

3 - They don't bother giving you all the information they should or ask the right questions about what they should be caring about - because they know you are not getting the job