



Contractor checklist for acing initial client meetings

Initiating and sustaining meaningful client relationships can transform the hard work of a skilled builder into a booming, leading business. But before a new project even begins, you first have to focus on impressing your clients with an out-of-this-world experience they can't say no to.

Homeowners today expect an interactive experience when it comes to their renovation projects or building a new home. Using construction software like Buildertrend will help land more sales, keep your clients engaged and guarantee an unbeatable experience that will keep them coming back.

Your potential clients also want a builder who is organized, transparent and uses digital tools to keep communication open. That's what our [2020 data report](#) found. From millennials to baby boomers and beyond, today's consumers crave digital experiences in every aspect of their lives.

Nailing your initial client meetings is critical to your business' success, and showcasing construction software like [Buildertrend](#) will help you do just that.

"Buildertrend definitely helps us sell jobs and keeps our clients happy," said Jeff Sawyer, owner of TruNORTH, a remodeling company in South Windsor, Conn. "Especially with the younger crowd, people in their 20s, 30s and even 40s. They're a little more technologically advanced. So, that sets us apart because they're looking for that type of software. We can really speak to that demographic, and they love it."

Use this guide to help you nail your initial client meetings and get all your construction projects started off right.

Start by asking all the right questions

Sure, choosing a contractor is a major decision for homeowners, but it's a major decision for you as the contractor, too. After all, your time is valuable. You want to land the types of clients who are a right fit for your business while also making sure you fit their needs as well.

Prior to jumping into any project, take some time to sit down with a potential client and have a chat. Ask the tough questions. The direct kind. Get all the information you need to apply the right processes and ensure you're the right fit together.

Ask these five questions right from the get-go:

Whether you're a remodeler or specialty contractor, every company likely has their own set of questions to ask clients before committing to a job.

Not all contractors are created equal – or offer equal services.

This key set of questions will help level set and ensure your team can provide the services clients are really looking for.

1. What are you looking for in a builder?
2. What's your budget?
3. How often do you like to receive updates?
4. How do you determine success?
5. What are some obstacles or changes you see coming?

Once you've learned all you can about a lead and determined they're a good fit, you can use construction project management software to help you land the sale.





Demonstrate your commitment to communication

Clear, **effective communication methods** make completing a project on time and on budget possible. Conflicts often arise when there are breakdowns between key stakeholders about important project details. This could be anything from a change order to an increase in price on selections. Keeping everyone on the same page will keep projects running smoothly and reduce friction.

Using Buildertrend's Customer Portal for real-time communication is essential for staying connected with your clients. It not only makes them happy, but it's a great way for you to keep your projects moving. You will oftentimes need your clients to decide on their product selections, change orders and other finishes. They can log in at any time to read daily logs, see schedule changes, choose appliances, make payments or manage messages and comments.

Give your homeowners access to use these communication tools and show them how much you value open communication.

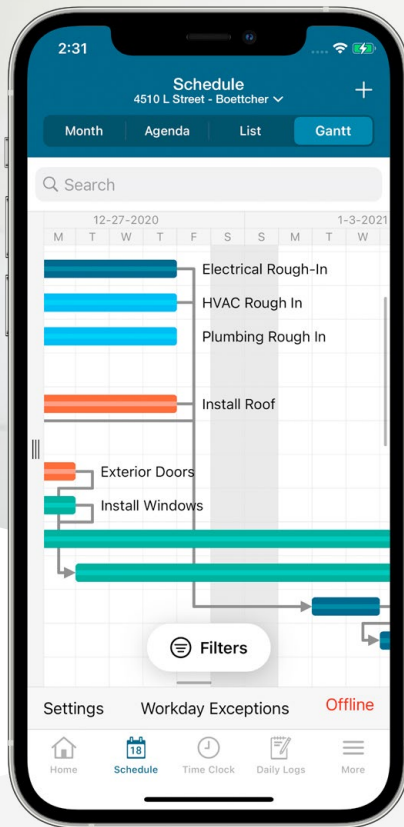
Messages: Homeowners will never miss a detail with all communication saved in one place. They can log in at any time to view received messages and send messages to you.

Files: You can give them access to files including documents, photos and videos. Everything they need is stored together and can be found quickly when they need it.

Comments: They can add comments to Daily Logs, To-Do's and Photos to communicate quickly with you, so everyone's always on the same page.

Mobile app: They can stay connected or check in from anywhere with internet access. With the mobile app they have access to all features and receive update notifications on the go.

By showcasing these interactive capabilities in your initial meeting, your clients can see how they will be involved at every phase of the job. They will feel more confident choosing you as their contractor because you've assured them that they will be included in every important decision, there will be less chance for mistakes and you care about their overall experience and satisfaction.



Highlight your dedication to transparency

Delaying timelines for construction job timelines can take a heavy toll. Not meeting deadlines and being unclear about the completion date for a new house or project can lead to unnecessary turmoil and unhappy clients.

All of this trouble can be avoided by keeping timelines on track with Buildertrend's Schedule feature, or as we like to call it, the backbone of our platform. The Schedule feature creates efficiency when managing job timelines and allows for seamless adjustments. Hit a bump in the road and need to make a quick shift? Schedule items in Buildertrend can be linked together, so fast timeline updates can be made in less than a minute with just a couple clicks. This is great for you team and your clients.

Before they even choose you for their project, show potential clients how dedicated you are to transparency. Show them how the Buildertrend Schedule works and how it can benefit them and the success of their project. Impress them with the ability to virtually follow along and keep up to date on their project every step of the way.



Be clear about contract terms and price

After determining a client is the right fit, impressing them with tech and landing the sale, it's time to talk contract.

Your **construction contract** arguably serves as your most important tool after landing a new project. And we mean any project - building a home, working on a remodel or taking on a specialty job. Also known as a building agreement, the contract between you and your client is a legally binding document that protects both parties. This document should include detailed sections outlining items such as scope of work, financials and construction schedule.

Being clear about project details, pricing, deadlines and other contractual obligations from the beginning will help avoid disagreements later on. It may even be a good idea to have your contract reviewed by a legal professional. Ensuring your contract is airtight will give you the confidence knowing your business remains protected from all angles.

Know your contract inside and out and be sure to include components such as:

- State-specific language
- Delivery method
- Identification of key parties
- Economics
- Dates of commencement and completion

You can learn more about these essential elements and others in our **[essential elements of a construction contract](#)** guide.

And be sure to add your contract to your Buildertrend account and keep it updated, so you're always prepared at the start of new jobs. Having your contract prepared and easily accessible will leave little room for communication breakdown or price discrepancy.

Think of these necessary steps as more than just due diligence. You're protecting your business while showing your clients that their expectations are your expectations. You're prioritizing their peace of mind.