



Creating Order
from Chaos

Professional Organiser Training

Module 2 – Strong Client Connection

Ethics

A code of ethics is what separates people who like to organise from Professional Organisers. People who like to organise may be really good at it. They may even set up a business and charge for their services.

A Professional Organiser recognises the important part ethics and integrity play in their relationship with their clients and colleagues. A Professional Organiser takes ethics very seriously.

NAPO Code of Ethics

Clients

Working Relationships

- I will serve my clients with integrity, competence, and objectivity, and will treat them with respect and courtesy.
- I will offer services in those areas in which I am qualified and will accurately represent those qualifications in both verbal and written communications.
- When unable or unqualified to fulfill requests for services, I will make every effort to recommend the services of other qualified organizers and/or other qualified professionals.
- I will advertise my services in an honest manner and will represent the organizing profession accurately.

Confidentiality

- I will keep confidential all client information, both business and personal, including that which may be revealed by other organizers.
- I will use proprietary client information only with the client's permission.
- I will keep client information confidential and not use it to benefit myself or my firm, or reveal this information to others.

Fees

- I will decide independently and communicate to my client in advance my fees and expenses, and will charge fees and expenses which I deem reasonable, legitimate, and commensurate with my experience, the services I deliver, and the responsibility I accept.
- I will make recommendations for products and services with my client's best interests in mind.

Colleagues

- I will seek and maintain an equitable, honorable, and cooperative association with other NAPO members and will treat them with respect and courtesy.
- I will respect the intellectual property rights (materials, titles, and thematic creations) of my colleagues, and other firms and individuals, and will not use proprietary information or methodologies without permission.
- I will act and speak on a high professional level so as not to bring discredit to the organizing profession.

Branding

Your relationship with your client or potential client begins before the first call, perhaps even before your clients know they want organising help.

Your branding tells the world everything about you and your business, whether you like it or not. It appears in every aspect of your demeanor and presence, whether in person, online, over the phone or in marketing.

What will your branding tell a client to expect? Are you discreet, non-judgmental, understanding, efficient, friendly, stern, approachable, honest, expensive, cheap, fast, organised?

What characteristics do you want to convey to your prospects?

How will you deliver that message?

Think about the colours, images and words you could use.

Think about the look and feel of your logo, website and other marketing material, and how you present yourself personally.

First Contact

You have just one chance to make a good first impression. A potential client may have chosen you on recommendation or from a long list of competitors. They may like your business name or logo, or what you say (or don't say) on your website. They may have a specific question they want answered. Many will have just one question – how much do you charge?

What information will you want to gather from your prospect when they call?

What information will you want to give your prospect when they call?

Converting the Enquiry

Your first instinct may be to “sell” your services. Or to answer the prospective client’s questions regarding price. Slow down.

Step 1: Listen carefully

Step 2: Describe your service

Step 3: Ask for the next step

Confirming the Appointment

Very often our clients have needed great courage to make that call. They've taken a big step and made an appointment with you.

Clients sometimes cancel. Here are some reasons why.

- They feel anxious
- They are disorganised and have forgotten to diarise the commitment
- They are not fully committed to the process
- We have made it too easy for them

How will you ease their anxiety?

How will you ensure they are committed to the process?

How will you help them to remember the commitment?

How can you make it harder for them to cancel?

Terms and Conditions

What will your terms and conditions be? Some considerations are

- Cost
- Payment terms
- Payment method
- Cancellation terms
- Hours of operation
- What you will provide
- What the client will provide
- What is and isn't included
- Health and safety issues
- Travel policy

Communication is the key to avoiding misunderstandings.

You should seek your own legal advice as to whether a formal agreement is appropriate for you and your business.

More Legal Stuff - Insurance

In Australia, there are generally 2 types of business insurance – public liability and professional indemnity. You should seek your own advice regarding insurance. Following is my limited understanding with regard to my business pertaining to insurance.

Public Liability insurance covers the things you do, the actions you take. If I were to break someone's heirloom vase it would be covered by my public liability insurance. If I moved a bookshelf in an unsafe manner, which caused injury to a person or property, it would be covered by my public liability insurance.

Professional Indemnity insurance covers the advice you give. If a client suffers a loss or injury due to poor advice, it would be covered by professional indemnity insurance.

Again, you should seek your own advice regarding insurance.

The First Meeting

Now you have an appointment and you meet your new client face to face for the first time. Will their first impression of you be borne out by this first meeting? In other words, will your branding be consistent with the reality?

How will you convey your brand in person?

Based on your first contact, you will already have a first impression of your client. Is your new client desperate for change, feeling overwhelmed, willing to let go, willing to listen, feeling pressured by family members, anxious, committed to the task? Are they friendly, honest, open? And how will this affect your dealings with them?

How will you deal with your inevitable preconceptions?

Clients Galore

Each client is unique. Each client has a story to tell and something to teach us. The best client relationships start with active listening.

Delivering difficult news or working with a challenging client successfully is easier when we first build trust. The quickest way to build trust is to show you have listened.

Never be tempted to take on a client you are not qualified or equipped to work with. The NAPO Code of Ethics specifically requires that we refer such clients to a more qualified or suitable resource.

Our willingness to help is not enough. We cannot “fix” every client’s problem. First, do no harm. Know when to refer.

Before & After Photos

Before and After photos have a very useful place in our work. I feel very strongly that their place is not in marketing our services.

What to do with Before & After Photos:

- Provide a reality check
- Help a client to see and celebrate progress
- Work and see progress while off site
- Help a client plan their space
- Bookmark progress
- Remind the client where things belong

What not to do with Before & After Photos:

- Expose a client's privacy
- Expose a client to judgement from others
- Use a client's difficulties and challenges to promote your business

What's more, I don't believe Before & After photos in marketing are effective. In most cases, they appear as though someone has simply tidied up. They cannot express the improved family harmony, the relief on the bank balance, the time saved or the feeling of joy when a client can find their keys right where they are supposed to be.