

# Ensuring Client Satisfaction Through Engagement



BY **RON PALMER**  
2019 RC CHAIR  
PALMER RESIDENTIAL

**O**ne of the biggest learning curves I had to overcome as a lead remodeler was figuring out how to match client expectations with trade work results before starting each individual trade step during the production process.

Most trades work involves many finer details than what's written or included in the project's scope of work, contract, blueprints, or design documents. Although many of these details are assumed to be included in the cost of performing trade work, there are often alternative options that can change the overall result. I often found that a client either lacked a full understanding or was only half-aware of details for specific parts of the contract and design documents given to them.

Palmer Residential has come to realize that the most effective way to ensure our client's satisfaction in the results of the build is by owning their expectations through high-level communication. In other words, making your expectations their expectations.

We found engaging with clients often and using effective two-way communication eliminated many assumptions that would otherwise be missed. We include regularly scheduled client meetings ahead of upcoming trades work as part of our project schedules.

We've created client meeting templates and checklists to aid in communication through each part of the build and typically use

visual aids such as elevations, cross-sections, and product specifications to ensure mutual understanding. We also send follow-up emails confirming meeting decisions and ask follow-up questions as needed.

*Engaging with clients often and using effective two-way communication eliminates many assumptions that would otherwise be missed.*

This high level of client engagement includes the client in the process, making them an essential part of the team. The icing on the cake: with the client on your side, once the project is complete and their expectations met or exceeded, they will effectively become part of your growing sales force. That's a level of advertising you can't buy. 🏠

## UPCOMING EVENTS

### REMODELERS COUNCIL DINNERS

Glendale Country Club,  
Bellevue

**SEPT. 26 | 6-8:30 P.M.**

Customer Service  
Excellence

**NOV. 21 | 6-8:30 P.M.**

Measuring What Matters

### REMODELED HOMES TOUR

**OCT. 26 & 27**

See tour sites at  
[remodeltour.com](http://remodeltour.com)



**Get more tips and tricks for exceeding client expectations at [mbaks.com/rc](http://mbaks.com/rc)**