



PROFITING FROM DESIGN

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The last proposal you'll have to write

Q I lose a lot of work because it takes me so long to get back to a new potential customer. Between the time it takes to meet with them, put together a plan and proposal and still keep my current projects running, many clients have already chosen to work with another contractor. How can I speed up my design/build sales process?

— George Margate, Mountain Lakes Landscape, Calgary, Alberta

A I have a process for everything I do, and you should too. I have standard operating procedures (SOPs) or best management practices (BMPs) for screening customers on the phone, managing the initial meeting, my landscape design process and even how I color render my drawings. Why? The better and more defined your processes are the more organized your projects will be, which translates to happier customers and higher profits.

This month I want to discuss one process many of you waste a considerable amount of time on: It's the proposal-writing process. I know, I know: What could be more boring or mundane than writing proposals? Well I couldn't agree more. That's why I no longer write proposals. I just take my standardized proposal template, make a few tweaks and hit print. Unlike my site visit proposal (see "Web Extras"), which you can use for smaller, non-design projects, this template is for bigger design/build installations. However, keep in mind that just because a project may be larger and more sophisticated, that doesn't mean your proposal has to be.

For example, when installing a paver patio or walkway, although your layout may change from project to project, your installation process stays the same. You'll still need to excavate down about 8 inches, put in a 4-inch base and a 1.5-inch screed bed. Next, you install the pavers, make your cuts, put in the edging and sand sweep the joints. So if this is how you do your paver installs, why do you need to reinvent the wheel and develop unique language every time you design a paver project? You don't.

Imagine if one day you decided to list all of the steps required for everything we do, including hard-scape installations, new plantings, etc., and wrote them all down? Now, what if you reviewed these processes with your coworkers so they could make comments and help you to fine tune them? Next, and only after you get a general consensus, you take this document, check for spelling and grammatical errors and save it onto your computer? You just may have all of the ingredients you need to create a master template that could be cut and pasted into a proposal in just a matter of minutes instead of hours.

Naturally, there will be some modifications you need to add to your proposal, such as paver style and color or the quantity and types of lights you're installing. However, all of the important language is not only already written; it has already been proofed for errors. This way you can be assured you're not going to forget to include one of those pesky little sentences like "we're not responsible for damage to irrigation lines during excavation," which could potentially cost you hundreds or thousands of dollars in irrigation repairs later on.

Although it's a template, you still may need to add a plant list to your proposal unless there's a planting schedule on the drawing. If that's the case, you can just use my three favorite little words, which are, "as per plan." Nothing shortens your proposal-writing process more than referring to the landscape plan and writing "plantings as per plan," "patio as per plan," "lighting as per plan," "swimming pool as per plan," etc., etc., etc. (as per plan).

So take the time now and document all your construction processes and create your own proposal template. It's certainly worth the investment and may be the last proposal you'll ever have to write. Combine this with my unbiddable master plan process (see "Web Extras") and you'll be getting back to your clients faster and selling more work than ever before.

To submit a question for Profiting From Design, please contact Shilan at jshilan@gmail.com.

» WEB EXTRA

Download Shilan's sample site visit proposal at wp.me/p2BT0U-8bx or read about his unbiddable master plan process here: wp.me/p2BT0U-8k4.