

Telephone Interview Questionnaire



Here is the process (you can adapt this for yourself) I recommend when talking to prospects – I like to ask a few questions over the phone first. Once you have this scripted, you can train your staff to screen the prospects, too. I recommend adding your own standard questions, too.

1. Start by thanking them for calling you. How did you hear about me/us? (If it is a referral from a client or other preferred referral source, your job is much easier.)
2. Find common ground first. I like to find out the basic project scope and a little about them personally without being too nosy. If you're a seasoned designer, you probably already have questions you always use.
3. Have you worked with a designer before?
 - a. Yes – Is there a particular reason you aren't working with that same designer now? (red flag if they complain about one or more designers – I usually ask a few more questions and then politely decline further conversation)
 - b. No – Would you mind if I ask you a few questions? It will help us both understand if we're a good fit to work together.
4. Are you interviewing other designers?
5. Are there particular reasons you are considering hiring a designer?
6. Have you considered doing the project yourself?
7. How will you know when you've found the right designer to work with you?
8. Would it make sense to you to decide if we're a good fit before we meet at your home? I don't charge for the initial conversation when we meet at my studio. By the end of that conversation, we'll both know without a doubt that we'll enjoy working together. What would be convenient for you? Give them some alternative dates.
9. Explain that both spouses (or all financial decision-makers) need to be present, and that you'll call to confirm prior to the meeting. If for some reason the decision makers aren't able to make the meeting at the time of confirmation, you will reschedule the appointment.
10. Send a confirming note and repeat that the decision makers must be present, and then explain what will happen during the first meeting. I recommend sending a complete package of information about you, your process, what makes you different, and questions they should ask and things they should think about before your meeting.

Next, confirm your meeting and even the morning of the meeting, you can confirm that the decision makers will be present. Reschedule if this isn't the case. Be firm. You'll waste your time if the key decision-makers are not there.

Depending on the conversation, you can use the Second Interview Questionnaire questions to do a more thorough job of determining the potential fit with the prospect.