

ASBA  2024

ASBA TECHNICAL MEETING & TRADE SHOW  
DECEMBER 3-6, 2024 | ORLANDO, FLORIDA

# *Managing Customer Expectations*

*Robbie Plett – Facility Armor*

*Jordan Foster – Foster Specialty Floors*



# ASBA 2024

ASBA TECHNICAL MEETING & TRADE SHOW  
DECEMBER 3-6, 2024 | ORLANDO, FLORIDA

## What to Expect

- *We will review some of the best practices in managing customer expectations in our industries.*
  - *From setting a clearly defined agreement prior to the project to delivering on that agreement.*
- *We will also discuss how to handle disagreements and confrontation when they arise in the process.*



# Objective & Outcome

- **Keys to Success**
  - Scope of Work
  - Primary Contact
  - Price
  - Schedule
- **Desired outcome - Build trust and confidence with a client and ways to create an enjoyable and rewarding experience.**

**ASBA**  **2024**

ASBA TECHNICAL MEETING & TRADE SHOW  
DECEMBER 3-6, 2024 | ORLANDO, FLORIDA

# Establish Primary Contact

- All Communication Should include this contact.
- No changes to the project/order should happen without involvement of that person who has been identified with that authority to approve changes.



# Define Schedule

- Establish the Start Date and Anticipated Date of Completion/Delivery.
- Give a realistic duration of the schedule
  - It's important to be as accurate as possible, but better to under-promise and over-deliver.
    - Deliver a day early, not a day late.



**Customer Communication Contract**

Date: \_\_\_\_\_

Contract Name: \_\_\_\_\_

Address: \_\_\_\_\_

Main Point of Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Emergency Site Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Authorized Personnel for Change Approvals:

Name	Phone	Email	Signature

Special Stipulations:

---

---

---

---

---

Mandatory Progress Report:

 Weekly  Bi-Weekly  Monthly  Bi-Annually

Start Date: \_\_\_\_\_

Method:  In-Person  Virtual  Phone Call

# Customer Communication Contract

**Mandatory Progress Report (MPR)**

Date: \_\_\_\_\_

**Participants List:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

**Changes/Updates**

---

---

---

---

---

Signature X \_\_\_\_\_ Date: \_\_\_\_\_

**Red Flags (if any):**

---

---

---

---

---

**Scorecard**

*How are we doing?*

Not Good  Needs Improvement  OK  Good  Awesome

If the answer was below 4, what can we do to improve it?

---

---

---

---

# Mandatory Progress Report (MPR)

# Scope of Work

- Should be clearly defined in the specification or proposal
- Change Order Opportunity
  - Typically, Floor finishes are one of the last trades in the building
    - Contingency money is often spent early in large projects – having a clear scope of work defined early can help you get a change order before it's spent.



# Product Specs / Submittals

- Submittals
  - Often required on projects, but always a good practice.
    - Your chance to clarify every detail of the product.
- Are your “equals” equal?
  - You don’t want to deliver a product that doesn’t meet the customer’s expectation.



# Customer Experience

- Sales / Prebid
  - First impressions are important – connect with your client.
- Installation
  - Your installation team is an extension of your company and will have more face time with the customer than you.
    - If they are hard to work with, it will hurt your customer relationship.
    - If they are easy to work with, it will make a happier customer and more likely to accept shortfalls



# Payment Terms

- Contracts are King
  - If things get ugly, the contract documents will dictate everything.
    - “Opinions are like...”
    - These projects can have large stakes, a well-written contract can make or break you.
      - Look at any bank document, mortgage paperwork, etc.
  - “Guy with the Most paper wins”
    - Any change from the original contract should be put in writing.
      - A quick email follow up to any verbal conversation is a good way to put a time-stamp on any potential change to the project.
    - Photos can be your best friend.
      - If Site conditions made you have to change your scope or schedule, be sure to document it with a picture.
  - Ultimately protects you and the customer
    - When lawyers are involved, everybody loses except the lawyers.



# Set Honest Expectations

- “When you want to help people, you tell them the truth. When you want to help yourself, you tell them what they want to hear.”
  - “Don’t tell me what you think I want to hear, tell me the truth.”
  - Applies to your customers, employees, contractors, suppliers
- It’s a lot easier to remember the truth than to try to keep track of all the excuses and stories you told along the way.
  - Customers can often see through a flurry of excuses.
  - If they catch you in one lie, they will assume you have told others.
    - Can cost you all credibility on a project.

