



THE PHOTO MANAGERS

CLIENT ASSESSMENT
GUIDELINES

IDENTIFYING CLIENT NEEDS

Identifying client needs is mission-critical when you are seeking to offer a solution that truly speaks to their problems.

Client needs are the named and unnamed needs your customer has when they come in contact with your business or when they search for the solutions you provide. To identify these needs, it's critical to solicit feedback from your customers at every step of your process.

This is a comprehensive list of the information we suggest you gather while getting to know your client. Adapt this information to fit your personal style, business brand, and client acquisition workflow. For example, determine what questions are most important during an initial phone call or meeting; it may be different for each client. Explain that your goal is to know all you can to ensure you are delivering what they need and these questions will help uncover items they may not have thought of yet. The more you know about your client's needs, the better the outcomes for everyone.

CAPTURE INFORMATION

The way you capture client information depends on your business systems. Here are a few suggested resources to help you get started.

- Create a standard email or checklist with questions that you send to a prospect to prepare for an initial meeting.
- Create a standard form in your CRM platform (Dubsado, e.g.) or Google Forms
- Create a Word Doc or editable PDF and add your logo at the top
- Create a list you keep near your phone to remind yourself of the important questions
- Scan handwritten notes and save to the client's file as a reference

CLIENT DETAILS

- How did you hear about me?
- What prompted you to call me?
- How can I help you?
- Address and directions if meeting in person
- Preferred method of contact & frequency? Phone/Email/Text
- Family members / ages / pets / geographic locations
- If a business, does this project have company support?
- For a family, is the spouse/partner on board?

TELL ME ABOUT YOUR PHOTOS & VIDEOS

- The current state of photos, videos (printed and digital)
 - Worries? Pain points? What holds you back from dealing with them?
 - Formats? On what devices?
 - Condition? Any damage or deterioration to be aware of?
 - Where is everything located?
 - Are photos currently backed up?
- Memorabilia that needs organizing? Letters, kids' artwork, newspaper articles, souvenirs?
- What computer platforms do you use? Mac/PC?
- Are there multiple people contributing to the collection?
- The primary way you take photos? Camera, phone?
- How do you share photos now?

ABOUT THE PROJECT

- What are your goals for your photo collection?
- What are your goals for this specific project (album, slideshow, etc.)?
- Are there deadlines?
- What is the budget you have allocated for this?
- How do you envision sharing photos with family/friends (or for business purposes)?
- Be prepared to discuss your preferred method of payment, frequency and how you communicate your progress

ABOUT THE CLIENT

This could be information you glean from a phone call/meeting; it does not necessarily need to be on a form they fill out.

- How comfortable are they with technology?
- Willing to do homework between meetings?
- Which of these four categories do they fall into?
 - A. You complete the project from start to finish.
 - B. You teach them the skills so they can do it themselves.
 - C. You come alongside and work on the project together.
 - D. All of the above.
- Are they interested in an ongoing maintenance plan?

CLIENT ASSESSMENT GUIDELINES

- Are there personal or business roadblocks that might get in the way of progress?
- Wants to keep everything or actively downsizing?
- What is their general organizational level?
- What is their personal or business communication style? Formal, informal, reserved, friendly?
- Anticipate working at their location or taking materials back to yours?
- Comfort level with discarding photos and other items.
- Start to get to know your client - ask them to tell you about a favorite photo or memory. This will help you determine their emotional attachment to photos and memories.

PHOTO MANAGEMENT SOLUTIONS

Use this checklist as a guide for discussing project ideas and scope.

DIGITIZING

- Prints - loose
- Prints - albums
- Slides
- Negatives
- Film reels (8mm, etc.)
- Film tapes (VHS, etc.)
- Audio cassettes
- Letters/documents
- Scrapbooks
- Kids artwork
- Memorabilia
- Heirlooms

SHARING

- Photo albums
- Photo books
- Slideshows
- Online gallery
- Framed photos
- Wall art
- Memorial photo board
- Photo gifts
- Photo collages
- Holiday cards
- Family history
- Business needs

STORAGE

- External Hard Drive
- Cloud
- Archival Boxes
- Archival Binders
- Audio cassettes
- Letters/documents
- Scrapbooks
- Kids artwork
- Memorabilia
- Heirlooms

TRAINING

- Photo software
- Cloud backup
- Phone backup

ORGANIZING

- Print photos
- Digital photos & videos