

# DEALING WITH CUSTOMERS AT CONTRACT SIGNING

*"It is vitally important to be sure you and your customer are on the same page."*



One of the biggest problems one faces in dealing with a client is misinformation. It is vitally important to be sure you and your customer are on the same page and agree up front on how changes will be managed. The best way to accomplish that goal is to be forthright and honest with your customer from the beginning and let them know you expect the same from them.

One tool which we have used very successfully is the *Customer Information Sheet*. You fill this out with the customer on one of your first visits and let them know you will use this information to make the job progress smoothly with as few surprises as possible. The information obtained on this form will be the best way for you to get the needed information for notices and other filings without intimidating your customer by constantly asking them for additional information. Get it done at the beginning and you are done for the job.

This information will also be very useful if you run into collection problems at a later juncture. If this should occur it will all ways be



difficult to obtain the information after the fact. Once you have it on file, that job is done.

Another reason for filling out this information at the beginning is to discuss issues with the customer that need to be communicated up front. It is the time to discuss the terms of the contract. A time to discuss payment schedules and the need to have signed extra ok's before any additional work will be done. A time also to explain the use of **Notice To Owners**. When it come to **Notice To Owners** be sure to explain the reason for them, and the fact that they can expect to receive several throughout the course of construction. Once the customer is informed of the notices they will not be shocked, as happens so often, when they get the notices.

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There are many other issues which should be covered at the initial meeting. These and other practical issues are discussed in our **Winning in Court** seminar. We feel it is part of the overall picture in being prepared to present your case if you should have to use the courts to get paid.

Our three hour seminar covers this and all other aspects of being prepared to go to court and win. The seminar is good for 3 CEU credits for all CILB licensed contractors in the state of Florida. Being prepared (a good offense) is always the best defense.

A copy of the **Preliminary Customer Information Sheet** is available on our website under the **Free Downloads** section. Be sure to avail yourself of this helpful information.

### **About Grass River Publishing:**

Grass River Publishing is dedicated to teaching individuals and companies what is needed to protect receivables. Being in the business for thirty years and seeing first hand hard working individuals and companies get into trouble collecting money due them, we felt it would be a benefit to share our own experiences. Collecting receivables and contract payments for services rendered can be as much work as doing the job itself.

Our experience has shown us there a infinite ways customers avoid paying their bills, some intensional some not. We have spent many hours in court collecting from slow and non payers. That experience has taught us what things are needed to win in court. This isn't a foolproof system, but it will greatly enhance your chances when you have to do battle.

We invite you to contact us for the latest schedule of seminars near you. We also will be glad to consult with you on an individual basis, or present an in-house seminar.



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