

Making Office Interviews Pay

Well, you know what they say about first impressions. More and more of us are interviewing clients in our office these days. Here are some suggestions about setting up for them. Done correctly, it can be a surprisingly big part of getting the business, and setting the tone for your ongoing relationship with the client.

But before your client even gets to your office, it is more than likely that they will have phoned the office at some point. Without getting into telephone technique here, there are a couple of basic things that should be on our checklists.

You or your staff should identify themselves as well as the business. Everyone should answer the phone the same way, and it goes without saying, they should be pleasant, they should literally, smile over the phone. They should make sure any directions necessary are given. I also recommend that your office should place a call to the client beforehand to confirm the appointment.

- Identify yourself
- Have a telephone protocol
- “Smile” over the phone
- Give directions
- Confirm

Now, when they come in, the first thing the client sees is the reception area (if you have one). It, of course should be clean and tidy, so if your receptionist does other work for you, it needs to be neatly arranged or out of sight altogether. Modern décor is probably the go, and you are after a warm, friendly feel in this environment. Lighting should be bright, not dull. There should be somewhere for the client to sit, but don't keep them waiting long. Have a table with some relevant, up to date magazines. Also, this area should not be somewhere where office talk can be overheard.

The meet and greet procedure needs to be a protocol. The client experience should be the same every time they come in. When the client comes into your interview office, get up from behind that desk and go 'round to greet them. By the way, I think it's a great idea to have a clean shirt and tie in the office in case of a luncheon mishap. Offer the coffee & slice or whatever upfront. I always greet clients by asking “How's your day been”, to get them talking early on.

Your desk, needless to say, should also be tidy, but here's a tip. If you tend to have a lot of files and stuff on your desk, get yourself a plastic box, and just before the client arrives, put everything into that, so it's all handy to take back out once the client leaves.

I used to have everything off my desk other than a pad, pen, and calculator, and computer of course. When you are ready to move out of the greeting stage of your interview, and into the part where you tell the client a bit about yourself and your service (we call this the “Relax” stage), put your pad and so on to one side, indicating that you’re not doing business until the client is comfortable with you and how things are going to proceed.

Think about having a second computer screen facing your client, so they can see what you’re doing on the computer. It takes away any barrier that the computer might otherwise create. It shows that you’re open and transparent, and it also involves them in the process. You can even have an additional mouse available for them. Once they start participating, pointing at the screen etc, they’re yours. They are no longer being sold to. Instead they’re participating in the process of selecting their loan.

I recommend that at the conclusion of the interview, you make up an information pack for the client so they have something to take away. You can include your brochure, any printouts from the interview, and your service commitment form (which you will have been through during the interview.) This gives the client something tangible to take away. An interview can feel a little unfulfilling for your client if they walk away empty handed.

Setting up your office for interviews is an area of your work that certainly deserves some thought and planning, and it can pay handsome dividends.

