

MAKE SURE THA PROSPECTIVE CLIENT IS A GOOD FIT FOR YOUR LAND SURVEYING ORGANIZATION

(YOU CAN FIND OUT IN A 3-MINUTE PHONE CALL)

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Introduction

I got a couple of phone calls last month from prospective clients. (I suspect as the economy has picked up pace that your phone has been ringing more frequently as well.) Both of these calls stood out to me as examples of how we need to make sure the clients we pursue and engage are a good fit for our land surveying organizations. (In this message I refer to land surveying organizations, but the principles apply to many engineering organizations as well.) Let me tell you a bit about both phone calls. Then consider if the potential clients on the phone would have been good fits for your organization.

The First Phone Call

The first call came from a young lady who worked as a real estate agent. She informed me that she needed an elevation certificate. She told me that she only had a budget of \$300 and she needed the elevation certificate completed the very next morning for a deal that needed to

close the afternoon the same day as the survey. She was frustrated that none of the other land surveyors she had left messages for had called her back.

The Second Phone Call

The second call was from a general contractor in Arizona. He was calling to follow-up on a "request for bid" that his company had sent to my office a couple of weeks before. The bid was for the work to provide construction staking for a new bank being built in Santa Cruz, California. I patiently explained that my company was located almost a 3 hour drive from Santa Cruz and that I wasn't going to be the cheapest surveyor he would find to perform this work. He responded to my explanation by saying: "So you are telling me you don't want to give us a bid?"

Both of these phone calls were short. They lasted no more than 5 minutes. Yet in that short period of time I learned a great deal about these 2 potential clients, and quickly

identified that neither were a good fit for my land surveying organization. What client characteristics did you glean from my description of the phone calls?

What We Learn From The Real Estate Agent

Let's think about what we learned from the phone call with the real estate agent that indicates she was a poor choice of a client for my land surveying organization:

She was trying to obtain a survey the night before her closing. This indicated she was very inexperienced or was very bad at her job. In either case, it meant she was disorganized and not a good planner.

She already had a set price for the cost of the elevation certificate, which she obviously hadn't gotten from a surveyor working anytime after the arrival of the steam engine. This indicated she was using bad information that she hadn't verified.

She had no idea how long it took, or how much it might reasonably cost, to perform an elevation certificate. She also had no idea how this cost could vary from parcel to parcel. Both of these factors meant she had no appreciation for the value a land surveyor brought to this part of a real estate transaction, and no concern for the quality of the survey product she received.

Our real estate agent wasn't the one paying for the survey, and was clearly viewing the need for a survey as an

obstacle she needed to remove so she could check a box on one of her forms, closer her deal, and collect her commission.

What We Learn From The Call With The General Contractor

Let's think about what we learned from the phone call with the contractor that indicates he was a poor choice of a client for my land surveying organization:

1) He was calling from Arizona for a job in Santa Cruz, California. I'm not sure what this company was doing on a pursuit of work so far from home, but it indicated that they were likely competing at a disadvantage because of travel costs, didn't likely have strong relationships in the city, and probably weren't worried about their long term reputation among the local business community.

2) He didn't know how far it was from Santa Cruz to my office Manteca, or he didn't care. This likely meant he had sprayed out a "bid" from every surveyor within 300 miles of the project location. This

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indicated he didn't care about quality or local relationships, he only cared about one thing: finding the lowest price. (I'll note he didn't ask at all about my scope-of-services or ability to perform the work. He was only worried about my fee.)

3) This contractor had no desire to learn about me or about my company. He had no desire in building a long-term business partnership. In his mind, one land surveyor was like any other. He probably spent more time deciding where to eat lunch that day than he did on choosing which professional would provide a key service on his project.

I don't regret passing on these two people as clients. It puzzles me that I get these calls in the first place. That wouldn't happen if other land surveyors weren't taking these people on as clients. Perhaps people like this may be a good fit for other land surveying organizations. It is more likely that they are a poor fit for every land surveying organization, and that land surveyors aren't skilled enough at business to recognize this.

It Only Takes 3 Minutes

It is amazing what you can learn in 3 minutes on a phone call with a potential client. Be on the look out for words like "bid" and "tomorrow". They are signs of trouble. Think about who you want to work for, and what type of clients are a good fit. Teach your business development staff to do the

same thing. Work for people you know, or people from your local community that care about their reputation and the quality of the services you provide. Take care of business partners that want more than a one-night-stand.

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