



Episode 18

How to Establish Processes & Systems in Your Design Business



**Jason: [00:00]**

Welcome to Designer Discussions. Are you dropping the ball? Are you overwhelmed? If so, we're going to talk about systems and processes today.

Intro: [00:20]

Welcome to the Designer Discussions podcast. Tune in each week where we discuss marketing, branding, PR and business advice for design professionals.

Jason: [00:25]

Welcome, everyone. We are joined by Loren Taylor today, and she's going to talk to us about systems and processes and how vital they are for your interior design business. How are you today, Loren?

Loren: [00:35]

I am doing great. How are you guys?

Jason: [00:38]

Good. Doing good. So if you could tell us just a little bit about yourself and give our audience a background into who you are, that'll be helpful.

Loren: [00:56]

All right. Well, I am Lauren Taylor of Loren Taylor Interior Design. And I've had my own firm for 17 years in Metropolitan Atlanta. Basically, I'm a classic practitioner, and I have an architectural background. So that is a key Tenet of the way that I put spaces together, with the architecture being really important and then layering in all of the design. So I think you have to know the rules to break the rules. So that's kind of the key Tenet of where I stand as a designer. And my mother is part of my firm.

**Loren: [01:28]**

She's a retired educator and has a background in finance. So she kind of is the business arm, but she also had really great taste. She was always a taste maker and an expert in entertaining. So she brings that together because we really also want to show our clients how to live. So that's what her role is in the firm. So that's who we are.

Jason: [01:49]

I love that having your mom as the CFO, that's beautiful.

Loren: [01:55]

Absolutely. Yes. And she definitely has a background for it. So she is phenomenal. But she's also got great taste. So it's a great balance.

Jason: [02:03]

Awesome. Good deal. So if you could talk to us just a little bit about what are the differences between systems and processes.

Loren: [02:14]

I'm going to give you an analogy. I love analogies. I hope that's okay. You can think of, like a transit system or something like the bus system. So the system is all the different steps that it takes to put that together. But you think of the processes as not just the individual stops themselves but everything that it takes, like maybe selling the transit tickets and somebody being there to assist people to get through the system and also delivering that system at the affordable price, because that's the tenant of transportation in that way. So that's kind of what it is that you're doing within your firm and the reason to come up with the policy and procedure manual in the first place. So that's the system and then each of the deliverables are the processes that you put into place. That's what I think of it as that makes sense.

**Jason: [03:20]**

So why do you believe designers, architects, interior designers, home remodels. Why do you think they even need systems and processes within their business?

Loren: [03:25]

Just so that they don't drop the ball so that they people don't understand that you're not buying the individual pieces, like, if not, you're not doing the same thing that they're doing. So sometimes people think that, oh, you're just fulfilling a shopping list per se. But it's the way that you're putting things together and the way that you're transforming that architecture or interior architecture, as well as getting those items into place in a pleasing arrangement to deliver the project. So people need to see what it is that they're purchasing, because when your items are at a factory being fabricated or you've ordered materials that haven't arrived, then it just feels like they're spending money and they don't know where it's going. Like, is this a scam? And if you have things clearly and concisely outlined and you communicate effectively with the client, then they better understand that process. They understand that they are a partner in the process and they know what's going on. So you just have to be upfront and transparent about what's going on and people understand their partner in the process and they're okay with it. But you just have to have that level of communication and the processes outlined and the deliverable. So this is what we said we were going to do, and this is what we've done. And this is the date it was completed and such.

Jason: [05:05]

Okay, that makes sense what issues or what problems are solved or not solved. If you do not have them in place.

**Loren: [05:14]**

You just don't have the timeline established. That's one thing that falls through the cracks. I think very often for people because they take someone's money. And then maybe, like with the initial kick off email, after you start the on boarding process, you haven't set up the expectations properly. So then you've taken too long to reach back out to the client. They check their bank account and you already have cash the check and you haven't communicated it or it's been a week. And you haven't said what's going on with when we're going to set up a kick off meeting, who's going to be working on my project? How are they going to get access to my house? That person has an out of town meeting or something coming up and they're going to be away. So you need to start defining when some things are going to happen so that you can get your subs in place and get them scheduled. What is the date that all materials are going to be on site? So really, just setting up every single expectation so that you are respectful to the client that's paying you. You're respectful to your employees or your subcontractors if you're a sole pure so that you can honor what their family obligations are and get on a schedule that you can stick to because nobody wants to be left in limbo, because then that makes everybody lose money.

Jason: [06:43]

Yes, for the new designers out there that may be overwhelmed on where to start. Where would you say, at a minimum, in terms of the systems and the processes they should start in terms of ironing out what they should have in place for their business?



Loren: [07:20]

Well, first of all, you just need to write down what it is that you're saying you're going to do for someone. So write down everything that has to be done to complete this project. So you don't necessarily. You can use someone else's processes as a guideline. But a lot of times, if you're starting out spot, you just need to be honest with yourself about what it is that you are going to deliver to the client. So you write down the onboarding process like you're going to send them a kick off email. You're going to schedule the initial meeting with the client, then next you're going to order. Well, first of all, you're going to do the project. So you got to establish a timeline. Honestly, how quickly can you put together the project? Is it a four week thing? Is it a six week thing? Because sometimes when people try to do these quick turnarounds, then you haven't given yourself time to really properly do the project. So be honest about it takes six weeks because I need to do these measures. I need to do these drawings. I need to get someone to help me set this up, set up a client file, set it up in the computer, just all of those things. So the measure and the actual designing. So going to a design center or wherever you source to find out after you've done initial layout before I approach a client, find out from vendors estimated timelines because I don't want to go to a client, sell them on this project. They're really excited about it. And then I find out it's going to be 25 weeks before I can get this upholstery or whatever the case may be. So you kind of need to do a little bit of homework, not overwhelming the showrooms because they are overwhelmed and the vendors. But just get some general timeline information and find out if certain key frames that you want to utilize are available or find out what you can get quickly. If that's important to your project.

**Maria: [09:14]**

Loren, could you tell us a little bit about how this helps to remove the emotion from a problem so that we can solve things better by having these systems in place?

Loren: [09:26]

Oh, my goodness, absolutely. When you have really put together a well thought out policy and procedure manual, then when you go to the rules book and you wouldn't say it in that way to a client, of course. But then it just helps you just be sensible and logical. You are just able to address the situation at hand. And I will give the caveat that, of course, if you are the one that has made some error. Then you also need to build that into your policy and procedure manual that if you are in the wrong with something, then how is it that you react? And if the client has done something or not paid for something in a timely manner, then this is what happened. When you have all of this outline, then you really can calmly reference it and be a little bit more stoic, and it comes across as much more professional. So I think that it just really makes you look better.

Mirjam: [10:39]

Yeah. Actually, I wonder from a very practical standpoint, what software or tools do designers use to keep track of their processes? What is it that you recommend? What do you use personally? Is it pen and paper or is it some type of software? Is it a personal thing? Is there something you can recommend.

**Loren: [11:04]**

Personally for me? I have used a lot of the free tools available in Google and Microsoft with Project Management. I think that you don't have to go in and invest in something and you don't even know if you're going to get your money back from that, because there's plenty of project management tools that are broadest. You just have to get everybody on the same page and you have to use something that's not going to be so difficult for your contractor or subcontractor that is going to make them be apprehensive about using it. But you really have to get them to buy into using the process when working with your firm. So there's nothing worse than having all these wonderful systems, and then someone hasn't bought into it like your subs and they don't use it. So it's perfect. And then nobody used it then that doesn't help. And that's problematic, too.

Jason: [12:06]

You know, speaking about that, can you talk a little bit about any subs that you have worked with and any issues you may have had where they did not have their systems and processes in place and what you have helped them out?

Loren: [12:20]

Oh, my goodness, absolutely. You know what? You can actually tell if a sub a lot of time has it together, by the way, that their work band looks when you pull up. If they've got, like, paper strewn all about and it looks like it should be parked at San Francisco, then there might be a little bit of an issue if that person is a phenomenal artist and and you really need to use their services, then you really can help people out and partner with them to say, hey, look, love what you do, love your work.

**Loren: [12:58]**

But let's get a little more organized. And can you come over to my office or can we meet at the lounge at the home improvement store and let's bang this out to set this thing up and we're going to start communicating through this. Can we try this out like I need you to do this because I'm in ABC's subdivision, and we really need to come across as more professional and really show up so that we can get more projects in this area. Are you willing to buy into that, or are you willing to try this out with me when you love working with people and you've established a good relationship, then a lot of times they're willing to come on. And if they're not. Sometimes. You have to leave people where they are because it can really harm your business being transparent. I have had that to happen to me where I got my backside hand it back to me because of having a good interpersonal relationship with a subcontractor, and they kept messing up, and I didn't fire fast, and that's what you've got to do to protect your name. You have to be quick to fire. You can't give people three and four and five chances because it damages your reputation off the rep.

Jason: [14:06]

100% higher, slow fire fast. And why I asked that question is because we have subs and some of them they have they act together, they have everything in place, lovely to work with others. They do good work, but they don't have their processes in place, and it shows when they're unorganized and not complete, and it can hurt us on the opposite end, too. So that's why I asked that question. And that's 100% higher slow fire fast.

**Loren: [14:54]**

I have one other thing I want to insert also about those sub, you have to constantly and consistently check to make sure that people's insurance is in place. So just because you took a certificate on a previous project that you just got through working with, that has to be part of your process, that someone in your business is checking on those background things. So it's not just about how this tile was installed to perfection. Then they back up into your client's garage. And like the insurance policy lapse, or they don't have the adequate coverage to take care of those kinds of things. Like, do they have the errors and omissions they forgot yet to put the nation in there and you're off site for a day, whatever the case may be, you just have to take care of those background issues, and that, too, should be written into your policy and procedures.

Maria: [16:00]

Loren, if you have someone come into your office as like an assistant or an intern by having your policy and procedures set up and in place, does that make it easier for someone who's coming into your business to help out?

Loren: [16:13]

Oh, absolutely. Because you also need to have an employee manual or a subcontractor manual to outline what it is that that person does. And you have to establish a calendar on a weekly basis of when certain things happen. For instance, maybe Mondays are the team meeting days. So like, maybe just on Mondays, there are no appointment sets because there are some follow up procedures and getting everybody on board to reconcile everything that happened for the previous week. And then now we need to go over what we're doing this week, like we've got appointments at the Joneses, the Smiths and the Abochrombie this week, and this is what's going to happen.

**Loren: [17:24]**

This is the process that we're in with each of the projects and any follow up or anything that's fallen through the cracks, then Monday. Excuse me, Tuesdays, then are perhaps the days that you go to the design center, and that's when you're putting together projects and the rest of the week, Wednesday through Friday, you take client appointments and then you know what project managers are visiting and working with subs and whatever the case may be. But you do have to have an employee policy and procedure manual to outline the different tasks and have order about how you run the firm and what days you do.

Jason: [17:48]

What once you have your systems and processes in place, how often should you review them to either update them or to revise them?

Loren: [17:58]

If it's working well, then you know that you've got the right processes down. If it's not things that keep slipping through the cracks, I don't think you really have to review them or roll with the punches and change if it's working well. But if you keep having mistakes or something where your clients not please, because ultimately, this is a customer service thing, and nobody said it from the back. A lot of times when you're in design school, you're humbled over your desk and you're trying to bang out the design. But this is really a customer relations and customer relationship business. So if your customers keep being satisfied and your deliverables are on time, then you're good to go with those processes, but you do need to review it, particularly if it happens more than one time. Then you're like, wait a minute. Why did this happen, or how did the schedule get off, for example, or how did a sub not show up? What process can I put into place to double check to make sure that we're on one accord?

**Jason: [19:36]**

All great information. So if anybody wants to get in contact with you for more information, how do they do?

Loren: [19:42]

So, Loren, you know what they can email me at Loren, L-O-R-E-N at LorenTaylor.co. And I will spell that L-O-R-E-N-T-A-Y-L-O-R.Co. So just reach out to me or they can hit me up on the Instagram. So hit me up on the gram at Loren, Audrey Taylor is how I'm listed. So just like Sophia, Loren, Audrey Hepburn and Elizabeth Taylor.

Jason: [20:18]

We appreciate your time today and for everybody, have a happy Thanksgiving, and we hope to see you all next week.

Loren: [20:26]

All right. Thank you. Happy Thanksgiving.

Outro: [20:31]

We hope you enjoyed this episode of Designer Discussions. What was your takeaway care to share your thoughts and tag Jason, Maria and Mirjam on social media? You can find them on platforms at DesignerDiscussions.Com. Don't forget to like subscribe and leave a review or comment for this episode from wherever you are listening.



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