

Features

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Getting What You Want

Katie Elzer-Peters



Have you ever hired a contractor to build a website, and after spending what seems like a bunch of money, you realize what the web developer built isn't anything close to what you actually wanted or needed? It's so frustrating to order up something and not get what you expected. It can also be costly, in terms of time, money, reputation and opportunities lost.

Here's how to consistently make sure that what you get is aligned with what you wanted, needed and were expecting from your skilled staff and professional service providers. (New, untrained workers are a bit of a different story. They'll need more training to be able to take and deliver an order.)

Read the Menu

Have you ever ordered off-menu at a restaurant? "Hey—I know the menu says the fish comes fried, but I was wondering if the kitchen could grill it medium-rare for me?" The person you're ordering from has only two possible answers:

"That's not on the menu, but we'll make an exception for you," or "We don't and cannot offer that."

If they say they'll give it a shot and you take them up on the offer, the result might be fantastic and it might be awful. (I was recently party to that exact scenario and the result was pretty awful!) If the server says, "We don't offer that," you have the choice to select something else or you can go somewhere else. If you're ordering food, it might not be a big deal to choose something else.

Now imagine you're ordering a website and considering going "off menu" with the web developer. They might say, "Well, I usually build on WordPress, but I'll give Shopify a try for you." Are you willing to take a chance with \$10K or \$50K on the line?

All of this is not to say that you can't order "off menu," and ask your store manager to update your website or your web developer to design flyers for you, but you'll definitely want to adjust your expectations if you know you're going "off menu."

Pay Attention to the Fine Print

Sometimes there's fine print. Perhaps, "We cannot accommodate substitutions." Or maybe, "Substitutions available for an upcharge." This fine print applies more to placing an order with someone outside of your business than with

your staff. If you're buying a product or service from a contractor make sure you know whether you're buying a specific, pre-determined service package or product, or if you're buying custom work. The price, terms and conditions, and process are often vastly different for standard packages versus custom work. If you've bought a package, but start asking for exceptions, you and your contractor will be frustrated and vice versa.

Ready? Use this phrase: "I'd like to place an order."

Once you're clear on the menu options, you can place your order. Is asking your marketing manager to make a flyer really "placing an order"? It sure is! You're asking someone to make you something—a flyer. How is that different than asking a chef to make you an omelet? It's not.

I like using the phrase, "I'd like to place an order" or "Let me place my order with you" or "I'm ready to order!" because it's very specific. That language says, "I'm about to ask you to do something and I'm going to expect to receive XYZ back from you."

If you start saying, "I'd like to place an order" regularly, then it'll become a signal to people. Just like the way a 3, 2, 1 countdown followed by a tone signals swimmers at a swim meet to dive into the pool, "I'd like to place an order" will turn into a clear first step of a known process. And a "known process" will always yield results closer to expectations than an unknown process.

Provide Specific Direction

Once you start placing your order, you'll know whether you're ordering on the menu or off, and what the ramifications of doing so are. You'll know whether you've bought a package or paid for hours to receive custom work. If you find that you don't clearly understand your choices go back to the menu and ask more questions. It's okay to say, "I'm trying to decide between the filet and the ribeye—can you tell me which one has more flavor?"

"I'm trying to decide between WordPress and Shopify—can you tell me which one is better for a business that only has 20 products to sell?"

There's a reason I don't use the word "instructions." It comes back to—you guessed it—the restaurant. If you order a steak, you make a choice and give direction on the temperature of cooking. Filet, medium-rare—you don't give the chef step-by-step instructions for achieving that result. Giving step-by-step instructions is job training, not placing an order. Confusing giving instructions with providing direction will create aggravation and lessen the chance you'll get what you want. Again, placing an order with someone to receive a product or service they already provide or know how to do is different than training someone on a new task.

For example, here's what instructions versus directions look like when it comes to creating a marketing email:

Directions:

Please make an email campaign to announce our spring sale. Use the look and feel of the holiday sale announcement email, but with pastel colors for spring and photos of the spring products. I'll need you to email me a link to review and provide feedback by 3/14/22.

Instructions:

Please make an email campaign to announce our spring sale. Log into MailChimp and copy the holiday sale announcement. Change all of the background colors to #ffee93 and the header text to #a0ced9. Grab the spring product images from [you get the picture]. I'll need you to email me a link to review and provide feedback by 3/14/22.

Always Ask this Question

Once you've given your direction, always ask this question: "Is there anything else you need from me in order to deliver?"

Author Michael Bungay Stanier includes this question in his book, "The Coaching Habit," as "And what else?" or the "AWE" question.

He says, "The AWE question has magical properties" because it tames our inner "advice monster." When you ask "And what else?" you're not telling the other person what to do. You're learning what they need so they can provide you with the best result.

When you follow those steps you'll find yourself a lot closer to getting what you want, need and expect from service providers and highly skilled staff. What else do you do when placing an order? Email me!

Katie Elzer-Peters is the owner of The Garden of Words, LLC, a green-industry digital marketing agency. Contact her at Katie@thegardenofwords.com.

Checklist for Placing a Complete Order

When placing your order, make sure you've answered these questions for the person taking your order. A great order-taker will always ask you these questions, but if they don't, you'll be primed to make sure they're covered!

- Did you give them what they need to do the project? (Files, access to systems, access to people)
- Have you defined what "done" looks like? What is the deliverable? A Google doc? A functioning website? A PDF? A link to a test email to review?
- Do you know who's responsible for providing collateral (such as photos, coupon codes)?
- What's the typical turnaround time for communication from your provider i.e., if I email a question at 2:00 p.m. on Thursday, should I expect an answer that day? Within 24 business hours?
- Have you set expectations regarding your turnaround time to review materials and reply?
- Did you introduce your provider to the people they can contact if they need access to software/photos/other resources?
- Did you establish a primary communication channel? (Text, phone, email, project management system)
- What's the due date?
- Are there any review benchmarks? When are they?
- Who can grant final approval?