IDENTIFY CLIENT READINESS LADDER TO ENGAGE EFFECTIVELY

CLIENT READINESS LADDER - WHERE THE CLIENT IS VIS-Á-VIS HIS DECISION IN THE SPECTRUM

Every client you speak to is at a different stage of the decision-making process. If you don't identify this early, you risk over-investing in the wrong conversations and underserving the right ones. This ladder helps you diagnose & respond strategically.

01

LEVEL 1 → Exploring Ideas

"I'm just thinking/getting inspired"

Client Behaviour
- Browsing Pinterest / Instagram
- No defined scope or budget
- Open-ended conversations

Your Approach
- Do NOT jump into solutions or proposals
- Educate and guide with broad insights
- Offer inspiration + direction (not execution)

Your Goal
→ Move them to clarity, not conversion

02

LEVEL 2 → Gathering Options

"I'm checking possibilities/ people"

Client Behaviour
- Talking to multiple designers
- Comparing ideas, styles and rough costs
- Still unclear on direction

Your Approach
- Position your thinking, not just your work
- Share process, frameworks, and past case logic
- Avoid detailed free consulting

Your Goal
→ Build your differentiation and start earning the trust

03

LEVEL 3 → Assessing Designers

"I'm narrowing down who to work with"

Client Behaviour
- Shortlisting 2–4 designers
- Asking for proposals, fees, and timelines
- More serious discussions

Your Approach
- Present structured solutions (not generic proposals)
- Anchor value before pricing
- Introduce your process and working model clearly

Your Goal
→ Become the smartest and risk free choice

04

LEVEL 4 → Ready to Decide

"I want to move forward now"

Client Behaviour
- Clear intent and urgency
- Budget discussions become real
- Ready for commitment

Your Approach
- Be direct, confident, and structured
- Present investment clearly with next steps
- Guide decision (don't leave it open-ended)

Your Goal
→ Close with clarity and control