
CONFIDENT CONSULTATION FORMS KIT

**Developed by JoAnne Lenart-Weary, Decorating and Staging Coach
How to Decorate and Stage
Division of The JLW Company
Confident Color System**





Hi, I'm JoAnne Lenart-Weary. I founded The Decorating and Staging Academy (The-DSA) in 1999 to help talented individuals turn their love for creating beautiful rooms into successful businesses. The Confident Consultation System was created when it was apparent students needed more than decorating knowledge. They needed tools that would help assess the project, communicate with the client and gather information.

To fill that need, I updated my own unique consultation system that I had used for years. Dubbed the Confident Consultation, it is a communication tool for students based on my own personal approach to client consultations developed in the early 90's. I realized the tedium of gathering information sometimes became lost in the excitement of scoping out a home. The well-meaning "design by committee" and interruptions of everyday life could result in leaving a consultation without key information. The Confident Consultation System allows anyone to gather information and make that important personal connection with the client. This effective system is the same one I and The Decorating and Staging Academy continue to teach our students.

Not only does this kit include the forms and overview from the Confident Consultation System, it also includes bonus information to help you to become a better prepared and educated entrepreneur. Although I am no longer in a leadership position in The Decorating and Staging Academy, I continue to create support materials and training programs for decorating and staging professionals for my company, How to Decorate and Stage with The JLW Company.

I hope you find these forms helpful. If you have any questions, feel free to contact joanne@thejlwcompany.com

JoAnne Lenart-Weary

THE CONFIDENT CONSULTATION™

The “Confident Consultation” is based on years of industry experience and the realization that the relationship with the client hinges on the success of the initial consultation.

By following the “The Confident Consultation™ System” you will be able to create a design plan for a client much more effectively and lead the client through the consultation process. This system also helps the client feel they are in capable hands. This system is recommended for any type of consultation including color, decorating, redesign, and staging to most effectively connect with the client.

Consultation Time Line

1. Client Consultation Intake Form-email or mail to client before consult. Encourage them to return to you quickly so you have time to review before client meeting.
2. Arrive at Client’s home, enter with respect, with bag containing tape measure, writing implements or tablet.
3. Social Niceties-Find common ground, something to compliment, and share enthusiasm for project.
4. The Confident Consultation-Get to Know Client
 - Review and/or Complete Client intake Form Quickly, remember time is money.
 - Confident Color System Color Profile-Eliminate 75% of Colors in 3 Minutes
 - Power Words Form-Select terms specific to focus space-form to follow.
5. Room Assessment-Get to Know Space
 - Assess Space-What Stays and What Goes
 - Measure Room
 - Measure Windows
 - Establish Existing Colors
 - Take Photos
 - Inspiration Triggers-focus features
6. Comfort Zone Shopping System
 - Create itemized list of all products that need purchased.
7. Client Discussions
 - Share Immediate Ideas
 - Establish Next Step
8. Create Invoice and Collect Payment



CLIENT INTAKE FORM

Please take a few moments to fill out this form to allow our firm to get to know more about you. Fill out the areas pertinent to your project. If you are unsure of a question, skip over it for now.

CONTACT AND FAMILY INFO:

Name

Address

Phone

E-mail

Family Size and Ages

Decision Maker (s)

Pre-determined Budget?

\$1000-5000

\$5,000 – 10,000

\$10,000 - \$30,000

\$40,000 - 90,000

\$100,000+

Other

Project Completion

In stages

All at Once

Finish Date

Reason for Redecorating?

How involved do you wish to be on this project?

- Very involved (Provide details and updates daily or weekly)
- Involved – Our firm acts as project manager (Update with install dates, deliveries, work schedule etc.)
- Minimally involved – don't call until everything is ready to install
- Surprise Me (Work within budget but this is why I hired you)
- Other: _____

House square footage: _____ House Age: _____ # Bedrooms: _____ # Baths: _____

How long have you lived in house?

Do you plan to sell in near future?

Yes

No

Is yes, when?

Things you love and dislike about focus room of this project.

What décor items must stay and be worked into plan? What items must go?

CLIENT:

SPECIAL CONSIDERATIONS-CHECK ALL THAT APPLY

- Disabled or Elderly
- Children below 6
- Special Sleeping Needs
- Handicap Accessible
- Home Office/Area Needed
- Pet Storage or Areas Needed
- Grandchildren/Frequent Visitors
- Pets

DECORATING PRIORITIES-NUMBER IN ORDER OF IMPORTANCE

- Bathroom
- Master Bath
- Office
- Dining Room
- Foyer
- Living Room
- Family Room
- Bedrooms
- Master Bedroom
- Kitchen
- Other _____

ARCHITECTURAL OR DÉCOR ELEMENTS UNDER CONSIDERATION:

- Furniture
- Flooring
- Re-upholstery
- Window Treatments
- Artwork, mirrors, accessories
- Space Planning
- Wallpaper or Decorative Wall Finishes
- Color Schemes
- Lighting
- Interior or Exterior Paint
- Moldings, trims, wainscoting
- Kitchen Remodel
- Bathroom Remodel
- Appliances
- Room addition
- Other

CLIENT:

DINING/ENTERTAINMENT

Kitchen Requirements	Don't Cook	Average	Above Average	Top of Line	
Does more than one person cook at a time?				Yes	No
Where do you eat most meals?	Dining Table	Kitchen Counter/Island	Kitchen Table	Family Room	
Entertainment Style	Formal	Casual	Buffet	Sit down	Potluck

DOWNTIME NEEDS:

Is area needed for family gathering for games, cards, crafting, etc?	Yes	No
Is children's play area needed?	Yes	No

Technical and media needs

- Computer-Desk Top
- Surround Sound
- Wireless DSL/Satellite
- Home Theater
- TV-Use Existing or Replace

ADDITIONAL LIGHTING

- Bathroom
- Office
- Dining Room
- Foyer
- Living Room
- Family Room
- Bedrooms
- Kitchen
- Other _____

STORAGE NEEDS

- Multipurpose Furniture
- Hidden Storage (for clutter issues)
- Closet Storage/ Organizers
- Kitchen
- Bathroom
- Collection Displays
- Books
- Clothing
- Office Supplies

CLIENT:

FOCUS ROOM:

DESIGN PREFERENCES

In order of importance: Number accordingly

Style	Budget	Quality	Longevity	Brand	Function		
Is green design important to you?			Extremely	Yes	Somewhat	No	Not sure

Describe perfect room in 3-5 words.

Style Preference:

- Traditional
- Transitional
- Country
- Modern
- Contemporary
- Romantic
- Rustic
- Asian

Fabric/Pattern Preferences-check all that apply

- Paisley
- Stripe
- Plaid
- Toile
- Silk
- Sheer
- Leather/Suede
- Bold pattern
- Velvet
- Tone on tone
- Cotton
- Textured
- Florals
- Mini-prints

Wood and Flooring Preferences

- Hardwood
- Carpet
- Laminate
- Natural Stone
- Concrete
- Tile
- Combination

- Bamboo
- Cork
- Light
- Medium
- Dark

Window Treatment Needs/Preferences-Check all that apply

- Custom Draperies
- Ready Made
- Semi-Custom
- None-Prefer Naked Windows
- Wood Blinds
- Roman Shades
- Shutters
- Verticals
- Room Darkening
- Sun Control
- Privacy
- Elegant Treatments
- Motorized
- Other

Line-Select leg style that appeals to you.



Special Notes:

CONFIDENT CONSULTATION SYSTEM

STEP ONE-CONFIDENT COLOR SYSTEM PROFILE

Color is a critical aspect of the decorating process. It can also be the most intimidating. This is exactly why we have created the Confident Color System. If you have not already attended this class, it is don't miss class that will take your color confidence to a new level. Check it out at confidentcolorsystem.com

Because color can be challenging, the professional will often repeat tried and true color schemes to avoid mistakes. The key is to find a color story that truly appeals to the client. The reality is the question, "What is your favorite color?" is a dead end question. Hue is not what matters but saturation is. Blue can look a lot of different ways but by using the Confident Color Profile test, you can narrow the focus and touch the blue that will make them happy. The blues on the right show a blue from Palette B and C. If your client selected one of those palettes and then says she loves blue, you would know exactly what kind of blue makes her happy. Notice how the blue on the left has a crisper, cleaner background as opposed to the blue on the right which is more muted. Saturation controls the emotional impact of a color.



Using our Confident Color System Profile will help you eliminate 75% of the colors in 3 minutes. If you have the old Sherwin Williams deck with a black deck, it will be easy to see the saturation changes. In the new deck, we break it down and set it up divided by saturation and not color. If you attend the Confident Color System class, we will provide that breakdown. If you are just trying to use the Confident Consultation System, look at your deck and diivide the deck by grouping:

- Palette B-Strips-Clean, crisp saturated colors
- Palette C-Muted, colorful saturation
- Palette D-Neutralized colors with a soft saturation

To administer the test, begin by comparing Group B to Group C. Ask the client if they had to choose from one of the two color palettes, which one would they choose for a specific room. After the choice is made, compare it to Palette D, again encouraging the client to make a choice between two palettes. After the final choice is made, you have the palette which most appeals to your client. You have eliminated 75% of the colors in the deck. This palette will be used to specify wall color, fabrics, accessories, art, upholstery, etc.



CONFIDENT CONSULTATION SYSTEM-POWER WORDS PROFILE SYSTEM

Ask your clients to select 3-5 words that would best describe the perfect room. Align the color and Power Words Profile to a particular room as their response may be different for a bedroom than a living room. The customer is not limited to the words on this page, feel free to add more or let them adlib. Once they have selected the words along with the Confident Color Profile, start to visualize a room that reflects the choices they have already made. How do those words impact the use of colors, the line, shape and form of room elements and more?

Dreamy HOMEY THEATRICAL Orderly
symmetrical
Trendy CLASSIC Calm Sophisticated
Happy sleek *Feminine*
Quiet
Surprising Cozy Opulent Formal
Zen CABIN Rustic *Whimsical*
Friendly Modest FUN ELEGANT
Serious Kid-friendly Retreat *Palatial*
Modern LOUD COUNTRY Refined THEMED
Sexy GLAMOROUS *Inviting* casual
Charming DRAMATIC Relaxed
Welcoming GRAND
Chic Peaceful Utilitarian Perfect Eclectic
Stark Exotic Important BALANCED
Youthful Unexpected CLEAN Traditional
Warm SPACIOUS SPORTY Romantic
Uncluttered Contemporary
Informal MASCULINE Bold
Colorful Mountain feel Rich Comfortable
Memorable

POWER WORD SYSTEM

CLIENT:



CLIENT:

SPACE:

CONFIDENT COLOR PALETTE:

Circle 3-5 words that personify the feel and look of the room you want. Do not be limited by words shown.

- | | | | | |
|--------------|--------------|-------------|---------------|---------------|
| Warm | Cozy | Inviting | Colorful | Peaceful |
| Calm | Zen | Traditional | Contemporary | Romantic |
| Masculine | Orderly | Clean | Youthful | Fun |
| Dramatic | Balanced | Formal | Exotic | Charming |
| Elegant | Whimsical | Stark | Opulent | Grand |
| Sleek | Simple | Airy | Sophisticated | Chic |
| Trendy | Eclectic | Open | Bold | Bohemian |
| Spacious | Informal | Casual | Sporty | Homey |
| Dreamy | Refined | Rich | Themed | Country |
| Shabby Chic | Happy | Western | Southwest | Memorable |
| Quiet | Bold | Vibrant | Welcoming | Friendly |
| Kid Friendly | Perfect | Charming | Unexpected | Southern |
| Intimate | Sexy | Cluttered | Theatrical | Pretentious |
| Stylized | Palatial | Utilitarian | Understated | Modest |
| Impressive | Modern | Flashy | Monochromatic | Beautiful |
| Lived-in | Sentimental | Luxurious | Memorable | Imperfect |
| Soft | Crisp | Clean | Unexpected | Impressive |
| Formal | Traditional | Eclectic | Country | European |
| Rustic | Pottery Barn | Farmhouse | Classic | West Elm |
| Vintage | Clean | Ikea | Horchow | Arts & Crafts |
| Tuscany | French | Ornate | Layered | Balanced |
| Lush | Glamorous | Sexy | Organized | On Trend |

COMFORT ZONE SHOPPING SYSTEM

The scariest question....what is your budget? You hate to ask it, they hate to answer it. The reality is things cost what they cost but in most cases, products are available at a good, better and best price point. The key is to find where your client falls in that breakdown.

Most people work budgets backward, they pull a number out of the air and expect you to make it happen. The Comfort Zone Shopping System is an itemized approach to what a project needs to be successful. It also allows you to compromise in certain areas that matter least to the client to highlight more important elements.

As you assess the space, simply list the items you feel the room needs. As you share the list with your client, suggest a range of prices for each item and ask your client what are they comfortable spending. After completing the list one item at a time, you will total it to provide your client with a clearer vision of what the room will cost them. This itemized approach makes more sense than trying to fit the room's needs to what is often an unrealistic budget.

After totaling the project, you will ask the client if they are comfortable about completing the project all at once or need to do it in stages. This allows them financial control and helps you prioritize the scope of the project. Also, be sure to make them aware the budget does not include sales tax, shipping or misc. expenses.

IMPORTANT NOTE: Collect the budgeted amount so you are shopping on their money...not yours. NEVER wait to collect the entire amount at the end of the process. We have seen it happen again and again, where clients let you do all the work and you never collect payment. This can put your business under very quickly.

If you are shopping retail, we suggest collecting 100% of the budget upfront, the balance will be due within 48 hours of final install based on whether they are keeping or returning any of the product. If shopping custom, the deposit should be enough to cover your actual costs. The balance will be due day of install as there is no return with custom products.

HOMEOWNER'S PHOTOGRAPHY RELEASE FORM

I grant permission to _____ to use photographs, video, audio recordings, and/or textural material created for use in promotional publications, including DVD, web sites or other electronic forms of media, and to offer the photographs, video, audio, or text for use or distribution to other advertising opportunities, without previously notifying me. These materials were made in association with the interior decorating, redesign or staging of my home or office.

In the event my home is selected for publication in a magazine, newspaper, or any other media opportunity, I understand my address will be kept confidential. I also agree the media may contact me for comment or interview opportunity.

I am 18 years or older and competent to contract in my own name. I have read this release before signing below and fully understand the content, meaning and impact of this release.

Date:

Name:

City, State:

Signature:

SAMPLE RESIDENTIAL INTERIOR DECORATING AGREEMENT

This is a very simple example of the type of information to include in jobs requiring an agreement. Feel free to use the language as is or adapt for your purposes. As each state has different laws, ask your attorney to review for your purposes. Items highlighted in color are a pointer to you.

This agreement between {Name}, herein known as "Company," and {Name}, herein known as "Client," is entered into this {date} day of {month}, {year}.

Client and Company agree to following provisions:

Project Location and Specific Areas:

Client is hiring Company to perform work in/on {space(s)} (where Decorator will be working) at location of home, apartment, etc.

Specific Services-Scope of Project

Decorator will perform the following services as part of this job:

- A. Concept or Design Plan: (description of design process)
- B. Details. (Services, furniture, fabrics, placement, wall colors, etc. agreed upon)

Timeline and Sub-contractors

Work will begin on date, and estimated date of completion is list completion date. Company is not responsible for delays or unforeseen problems that might delay completion such as out of stock items, delayed shipping, undisclosed architectural problems, Acts of God, and other unforeseen details.

Work will happen in the following phases: description of the phases of work.

Decorator will use following contractors or third-party employees for the completion of the work: {list of contractors}.

Payment

Client will pay x amount for these services, payable by details of how payment will be made, including any deposits.

Non-payment of {amount} by {date} will result in explain ramifications ie, work stoppage, termination of the agreement, etc.

Changes

Any changes made to this plan must be discussed with Client and approved in writing before their implementation.

Cancellation

Client has right to terminate this agreement if list reasons Client is allowed to terminate.

Company has right to terminate this agreement under following circumstances, reasons for which Company may terminate this agreement.

Liability

Damage or liability will be covered by stipulations about who will be responsible for damage caused in the design process.

Enforceability

If any provision of this agreement is deemed unenforceable, the remaining provisions will be binding and enforceable.

This agreement is subject to the laws and regulations of the state of State.

Client Name

Client Signature

Date: _____

Company Name

Company Signature

Date: _____