



Design Business Growth Checklist



DESIGN DASH

DESIGN DASH

Are You Ready to Jumpstart your Design Business Growth?

USE THIS 10-POINT CHECKLIST BEFORE YOU MAKE THE LEAP

When I first started my small boutique and design studio, I had my sights set on something BIGGER. I knew where I wanted to go, the clients I wanted to have, and the revenue I wanted to hit. But getting there was not so straightforward.

I quickly scaled up only to scale back just as fast. It was only after I developed a repeatable process and hired the right people, did I begin to see the success I hoped for.



For me, this was 15 years of trial and error. While I wouldn't trade these experiences for the world, I would have loved to take out some of the guesswork. I created this 10-step questionnaire to do just that. Remove your doubts by clearly evaluating where you are currently. Then, you can truly assess if you're ready for growth now, a couple years from now, or maybe you're fine just staying where you are.



DESIGN DASH

Do you have an established brand?



Is your brand recognizable and beloved by your clients?

Are you receiving new clients via word-of-mouth?

Would you say your reputation in the industry is a positive one?

If you've answered yes to all of these questions, then you're well on your way to having an established brand, which is a big indicator that growth can be successful.

DESIGN DASH

One area of your brand that you may not think about is how your current team is aligning to your firm's values.

And if right now, your firm is just you, you'll need to document your brand's voice, vision, and mission prior to growing your team. Here are a few questions to help you get started:

- **What values drive your firm? Is it client-service? Bold design choices? Do you have a charity you're tied to?**
- **What do you do better than any other firm out there?**
- **If you asked your clients to describe your firm in 3 words, what would they say?**
- **Same question, but for your top 3 competitors.**
- **Do you have a set of brand guidelines, including logo, color palette, and fonts?**
- **Who are your ideal clients and where do they find you? Online, in-person, in magazines?**

DESIGN DASH

Are you booking your clients months in advance?
Are you on a waitlist?

Do you have more business than you can handle?

If you and your team are booking out clients weeks, months – or even years – in advance, it might be time to expand. This is one of those “great problem to have” situations, but it still requires careful planning. Consider what is keeping you from taking on these clients. It could be because you need more designers working on production.



This is the most obvious “solution,” but it may not be the correct one.

If you’re spending too many hours with accounting or marketing, a better solution could be to bring more back-office staff in-house, leaving you free for more design work.



DESIGN DASH

Do you want to grow? Have you thought about how you want to do it?

There's an old joke that asks how many psychologists does it take to change a lightbulb? And the answer is, just one, but the lightbulb must WANT to change. Before you consider growing your firm, you need to want to do it!

There are so many reasons to grow - you'd like to add another service line, you want to move into another geographic market, or maybe you'd like to meet the demand of an increasing sales pipeline. In any case, you must first determine your reasons for growth in order for growth to be successful.

Here's what I do - I journal!

I physically write down my goals for my business on a regular basis. Every quarter, I meet with my leadership team and we discuss company goals together.

We have a 3-month plan, then a 1-year, then 3-years, then 5-years, and finally a big, audacious 10-year plan. Because we're talking about these goals every quarter, we are consistently staying focused, and we meet about 90% of what we set out to do in the timeframe we have agreed upon.

In these meetings, not only are we talking about why we want to grow, but how we want to do it. Just talking about growth has been essential in actually making it happen.

DESIGN DASH

Do you know your ideal target client?

You're ready to grow if 1) you understand your ideal target client inside and out, 2) those clients are coming back to you, and 3) those clients are referring you to their colleagues, friends, and family. This is so important. You can't effectively grow if you're not reaching your client base.



Not only has your small business experienced a surge in new clients, but you also have repeat clients and referrals from current clients. Once you understand the needs, preferences, and demographics of your target market, you can expand your firm in a more focused way. Without this type of insight, countless small businesses struggle to expand efficiently and often burn out.

DESIGN DASH

At my firm, we create client avatars and review these avatars annually for updates. Our ideal target clients stays relatively the same, but those subtle changes can make all the difference. When building our avatar, we consider:

- **Demographic information, like age, gender, and household income**
- **Psychographic information, like hobbies, personal values, and lifestyle**
- **How our best clients found us (website, social media, editorial, in-person event)**
- **The types of projects our ideal clients seek us to complete**

Develop your ideal client avatar by taking your best client and considering the above as it pertains to them. Do that for your favorite clients, by service line and project type.



DESIGN DASH

Are you financially prepared to grow?

Going from sole proprietor to bustling business owner of a small team takes more than goal setting. It takes cash. As your business grows, you will need extra capital to invest in your new location, product line and/or additional employees.



Your business might be ready for growth if your business finances are stable and your cash flow is consistent. You must also have steady profits, and you have access to loans.

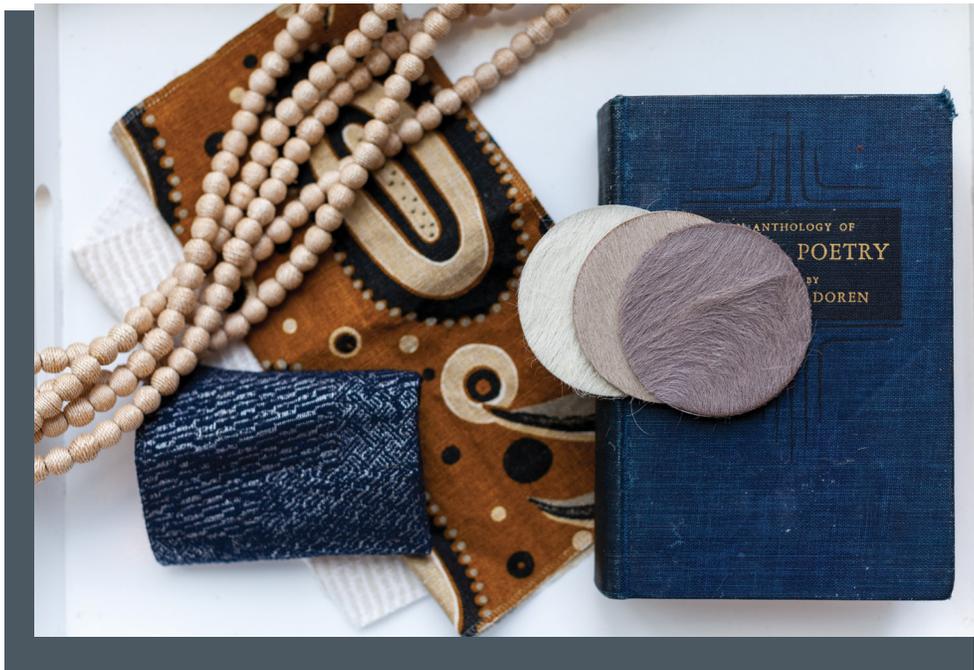
One of my biggest pieces of advice is to establish a reliable relationship with your banker. When you need that loan to expand into a bigger office, having someone you trust is critical.

DESIGN DASH

Is your team ready for growth?

You may already have a small team of a few talented designers, and you're crushing it! But are they ready to join you along your growth path? Surrounding yourself with partners and employees who are excited and personally invested in your business' growth will help ensure your expansion has momentum.

Having processes in place that allow your team to perform their jobs through a transition is essential to successful growth.



DESIGN DASH

Something as simple as a timeline of client touchpoints and how to address each touchpoint is a great start. For example, you can walk your team through the following:

- **How we engage potential new clients from awareness through to close**
- **What happens when a design agreement is executed**
- **How to prepare for, schedule, and host your discovery, inspiration, and design presentation meetings**
- **How to interact with internal team members, like in-house architects, and sub contractors, builders, and vendors**
- * **When does the purchasing process start and when do we need to interact with accounting**

You may have all of the above documented and sealed in your brain, but your team could be addressing each of these steps in their own, unique ways. Consistency is key, as well as full transparency of expectations. Once your team has clear accountability of each step, it's easier to begin the change management process of growth. A documented process is your team's North Star. When it's reliable and repeatable, they can always come back to it to guide you to where you're all going together.



DESIGN DASH

Do you understand your market? Your positioning?
And do you have room to grow?

For years, my interior design firm collaborated with outside architects. I have worked with wonderful firms that we still work with today! But I noticed that there was an opportunity to have more creative control if I also offered architectural services. So in 2020, I brought residential building design services in house with the onboarding of my now-partner, Gina Elkins. Granted we did this in January of 2020, just ahead of complete shutdown with the Covid-19 pandemic. However, we weathered the storm so much better than we thought because there was a gap in the market. Our clients wanted an effortless creative experience, so finding a “one-stop shop” so-to-speak, where we had all aspects of the home’s design in-house was very appealing to them.

Before you grow, find that gap in your desired market. It could be a new service line, as it was with me, or it could be a new location, a team member with a talent for biz dev, or even a better receiving warehouse. Look for an advantage over your competition.



And speaking of competition, your advantage could be grabbing more market share. Invest in your marketing to generate more awareness of your brand. Or invest your own time into a networking push and get yourself out there. Overall, you need to understand WHERE and IF you can grow before it happens.



DESIGN DASH

Do you have good partners in place?

This business is nothing without its relationships. From your architects and builders to your vendors and warehouse receivers, you need to have good partners (with great reputations) if you're planning to grow.

My firm regularly partners with our most-specified vendors on marketing efforts, which is always a win/win. Whether it's collaborating on a photo-shoot or providing content for an editorial piece, I like to take our relationship beyond the project so we're working on our businesses together.

Reach out to the vendors that you source the most. More than likely, they are eager to partner with you on marketing, that is, photography and video that showcase their products in a finished environment. This is great for you because you're not only building a partnership with them based on a mutual goal, but you're increasing your audience.

Can you delegate?

I think the honest answer here is usually, "Yes, but it's not my favorite thing to do!" It doesn't have to be your favorite thing, but it does have to be at the top of your leadership repertoire.

As you grow, naturally, you're going to also have to let go. You won't be the only one in control anymore! You'll have designers managing projects of their own, marketing teams that handle your social media, and accountants sending out your invoicing.



DESIGN DASH

All of this is so you have time to do what you really love to do: be creative. Not only that, it contributes to your ability to step away, to travel, spend time with family, and know that your firm will continue to be successful in your absence.

Now all of this is easier said than done. A great place to start is creating a document with three columns:

- **In the first column, write down all of the things you love to do**
- **In the second column, write down the things you are good at, but would rather not do**
- **In the third column, write down the things you don't like to do**

Whatever you write in the first column can be things you retain in your role as business owner. The items in column two are the items you delegate to your team, with the knowledge that you can step in every once in a while to keep these tasks moving. And in the third column, these are items you need to hire for.

Find someone who would put these items in their first column. Maintain a healthy knowledge of all the tasks your team is in charge of, even if you're not doing them yourself. This will make you a stellar manager and good at delegating. It's not possible to assign something that you, yourself, don't understand.

DESIGN DASH

Do you need a bigger office?

This one seems like a no-brainer, but in the world of hybrid environments, it's not so cut and dry. You can do a lot virtually, as Covid shutdowns have taught us. During the pandemic, my firm moved to 100% virtual operations, and while we've come back to the office now, we have done so in a mixed capacity. Teams are expected to be in the office when they need face-to-face collaboration, but if they are heads down working, they can do it from home. We have a large team, so we do need a physical office that can accommodate us all.

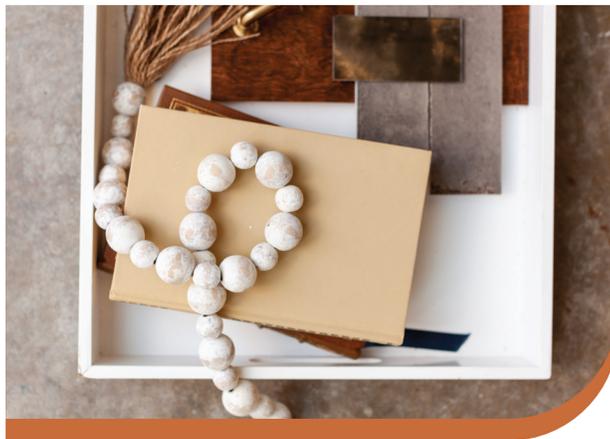
If you are meeting clients, you will also want a designated space outside of your home or local coffee shop where you can professionally convey your design ideas. Evaluate if you need a physical space by thinking about: in-person meetings with clients, equipment your team needs to complete design work, and an address to receive vendor deliveries.



DESIGN DASH

If you have answered YES to all of these questions, then you are ready to take the next step: growth! Which is really exciting.

When I was ready to grow my firm, I had a million questions, but very little answers. There simply isn't a gold standard process for what we do as Creative Entrepreneurs. But that's starting to change. Join our private [Facebook group](https://www.facebook.com/groups/designdasher) (<https://www.facebook.com/groups/designdasher>) to be added to the Design Dash community, where our first topic is how to scale successfully.



If you answered YES to more than half of the questions, you are well on your way to setting the foundation for strategic growth.

Find other design firm owners who are in the same spot you are within our private [Facebook group](https://www.facebook.com/groups/designdasher). (<https://www.facebook.com/groups/designdasher>) I will be there answering your questions, along with my colleagues who are also experts in the topic of smart, stable growth.

If you didn't find yourself answering yes all that often, that is okay! Growth takes preparation and you must be absolutely ready before taking that next step. If you're at a different stage of your business progress, Design Dash is still for you. In the coming months, we will be sharing resources and tips for not just growth, but starting out, pricing right, marketing to your ideal clients, and so much more.