

# THE EXPERIENCE™

• CONVENTION AND TRADE SHOW •

SEPTEMBER 3-5, 2025

CAESARS FORUM CONFERENCE CENTER  
LAS VEGAS, NV



# The Client Onboarding Method

That everyone involves **DESERVES**

“Restoration Contractors don’t get paid on time or in full because they don’t properly set the terms”

# The Client Onboarding Method

## The MODERN Way

The process you thought you were doing correctly...  
the old way



# [Lesson Discussion]

“We’ve all had that client. Nods along. Signs the contract. Then flips out when the check doesn’t show up from insurance. That’s not a client issue. That’s an onboarding failure. And it’s avoidable.”

Discussion on how our competent but dangerous pace to get started and leave the customer unprepared was what they wanted. When in fact, what they want is to trust you and to know what they are getting into.

# The Client Onboarding Method

## Most Contractors vs. The Pro (8%)

The 92%-

Sign and Hope

The 8%-

Onboard and Control



# [Lesson Discussion]

“Most contractors sign and hope.  
Hope they pay. Hope they don’t push back. Hope they don’t ghost.  
Pros don’t hope. They onboard.”

By showing up with a rock solid plan, a process and confidence, we can help put the client at ease, remove stress and signal that we are the professionals they hoped we would be when they called us.

The Client Onboarding Method

# 5 Pillars of REAL Onboarding



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5. “Whole Team Buy-In”

# [Lesson Discussion]

“This isn’t one convo. It’s a full-body approach.”

Explain that a consistent, intentional, uniform and confident theme of conversation will set the client, the team and you at ease.

# The Client Onboarding Method

*5 Pillars of REAL Onboarding*

## 1. “Start before they call”

“Your marketing IS onboarding.”

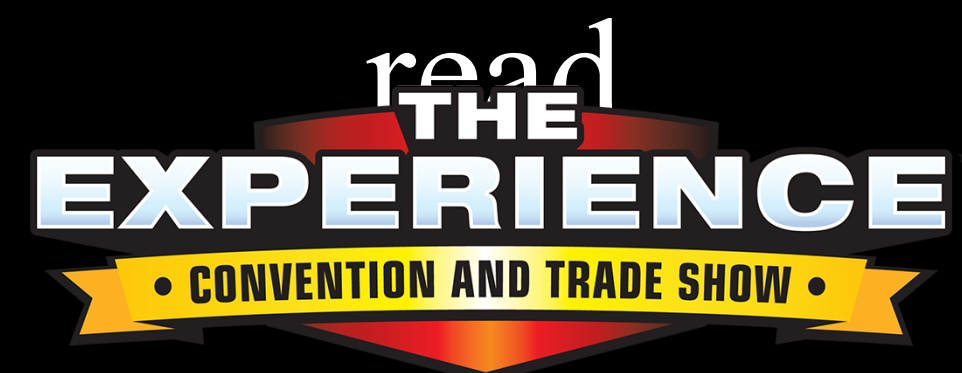


# [Lesson Discussion]

“The onboarding starts before the phone rings.  
Your website. Your reviews. Your social. They’re all pre-framing the job.

If your site says ‘We work with your insurance!’  
but your PM says, ‘We don’t,’  
You didn’t onboard. You bait-and-switched.”

Brief what signals we have control over that people actually consider and



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## 2. “The Expectation Talk”

“We don’t finance insurance companies”



# [Lesson Discussion]

““This talk happens BEFORE the first hammer swings:

- How long will it take?
- How loud? How clean?
- Who’s responsible for what?
- When do payments happen?
- And what happens when they don’t?

Say it with confidence. Say it kindly. Say it EARLY.”

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## 3. “Fair but Firm”

“Same rates. Same rules. Every job.”



# [Lesson Discussion]

“You’re not gouging.

Your rates are based on math.

On payroll. On training. On doing things RIGHT.

So when a client balks, remind them:

‘We charge the same for everyone. Fair is firm. And firm is fair.’”

Help empathetic restorers overcome that little voice in their head that tells them they must PROTECT the client from additional abuse.

We do, in our own way.



# The Client Onboarding Method

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## 4. “Empowered Clients”

“You (the customer) is in charge, not the carrier.”

# [Lesson Discussion]

““We gently remind the client:

They are not a pawn. They’re the decision-maker.

We’ll handle the job. They handle the players.

We tell them:

‘Our job is to serve you. Your job is to hold everyone—*including us*—accountable.’”

A short discussion reminding people that being a servant is to strengthen others with a sense of power and value. To remove feeling like a passive participant and instead an empowered party.



# The Client Onboarding Method

*5 Pillars of REAL Onboarding*

## 4. “Whole Team Buy-In”

“Same truth. 100 ways. 10 voices”

# [Lesson Discussion]

““Techs. PMs. Office staff. Everyone says the same thing. That’s how trust gets built. That’s how chaos gets killed. The message doesn’t live in a file. It lives in your people.”

Discuss the positive outcomes with consistency, confidence and accountability through intentional processes.

## Common Objections We Hear

“They don’t scare us.  
They reveal weak scripts”

## Common Objections We Hear

“What if the client pushes back?”

They will if you don't have a believable reply or if you surprise them.

## Common Objections We Hear

“But the adjuster won’t pay if we don’t educate them”

Cool. Let the client do that. It’s their job, not yours.

## Common Objections We Hear

“Customer doesn’t have the money to pay this.”

Then you might be doing the wrong work for the wrong customers.

## Common Objections We Hear

“Customer doesn’t have the money to pay this.”

*Alternative answer:*

How do you know that for sure?

## Common Objections We Hear

*One more.....*

“Customer doesn’t have the money to pay this.”

Their insurance does, right?

## A Final Challenge

“If you don’t say it early, you’ll pay for it late.”

“If you don’t say it early, you’ll pay for it late.”

# [Lesson Discussion]

“Restoration is risky.  
But unclear expectations? That’s suicide.  
Say it early. Say it clearly.  
And watch how your profits, projects, and peace of mind change.”

Drive home the promise you make and the promise others make.  
Remind the audience that what they DO NOT SAY, others will say  
someone else instead.

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## Q&A Time

I have 8 minutes  
left for questions.

Or



Thank You

