



## How to Work Successfully with Your Clients

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One of the best ways to build lasting relationships with clients is to use words and terms they clearly understand. This is particularly true with clients new to e-commerce who rarely have the technical background to know the difference between HTML and a Name-Value Pair – and probably don't care. They know they need a shopping cart and online payment processing, but how those are integrated is less important to them than making sure it's easy for their customers to check out.

The following checklist can help bridge the communication gap between “developer speak” and “business language” and help ensure that your e-commerce or payment integration projects run as smoothly as possible.

### **Ask your clients to do a little homework.**

Before your initial meeting, encourage clients to look at other e-commerce sites and identify checkout-flow examples they'd like to see on their own sites. This will help them focus on the various features, which in turn will give them a better understanding of what they're looking for.

### **Provide useful background information.**

A wealth of e-commerce-related best practices is available online. Whether your clients are just adding e-commerce capabilities to their websites or seem interested in integrating more robust payment solutions, suggest that they check out the articles and forums on the PayPal-sponsored [Online Merchant Network](#). You can also download marketing kits and get presentations, product sales sheets and other important documents for your clients to review.

### **Determine how tech and payment savvy they are.**

A good way to find out how knowledgeable your clients are is to be a bit of an investigative reporter – but always in a non-threatening manner. Start out casually, in a conversational manner: “Why don't you tell me what browser and email you use?” Then proceed to more advanced questions, keeping the tone friendly and avoiding tech jargon: “Where is your site hosted now? Do you have a security certificate?” By being inquisitive, you can gauge how detailed your explanations need to be about the capabilities you're providing them.

### **Give them a demo.**

Not all online merchants know what they want when they first contact you. That's one reason some developers offer demos that walk merchants through the actual shopping and checkout experience. Going through this process typically helps clarify what they want and/or need. If you don't have your own demo, point them to a site that demonstrates checkout-flow best practices.

### **Use business language.**

The key to a successful project is gathering your clients' business requirements without burdening them with the technology needed to make the requirements a reality. Use straightforward, non-geek speak – and talk in terms of bottom-line results. For example, ask if they want to give a discount when a customer orders more than X number



of items at once – and be prepared to tell them the business benefit of doing so.

### **Keep it simple and pause along the way.**

It's hard to totally avoid technical explanations, and it isn't always possible to know if you're providing too much or too little in the way of details. So, as you're explaining the project, pause and ask if what you're saying is clear. Reassure your clients that there is no such thing as a stupid question – and that they should feel free to interrupt you at any time to get more clarity.

### **Find your match.**

You know what your technological skills are, and you may have done dozens of PayPal payment integrations. But you still might not be the right person for the job. For instance, you may program using PHP only to find out that the client's hosting provider doesn't support PHP code. Don't be afraid to gracefully turn down a project. Your clients will respect your integrity.

### **Scope the project and name your price.**

As you talk with clients, try to get a sense of their budget. If you can't realistically complete the work they want at the price they can pay, be prepared to either walk away or to frame a solution within their budget. It's often a good idea to start slow and then add features as your clients' businesses grow.

Thinking about this checklist before you start a new project will help ensure its success and increase the chances that your clients will refer you to others who need e-commerce and payment implementations.

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