

Cost a project and negotiate with a client

Overview

This Standard is about obtaining a booking that is beneficial and acceptable to both parties. The manner of negotiation is a combination of professionalism and diplomacy.

This Standard could apply to anyone who liaises with clients on potential work.

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Performance criteria

You must be able to:

1. clarify your understanding of clients' needs using information from reliable sources
2. analyse the benefits for the business for individual projects in line with company strategy
3. use reliable information to estimate available budgets for the stage of production with which you are involved
4. identify possibilities that are technically feasible and within project constraints and which are consistent with what clients want to achieve
5. identify contingencies and additional skills or equipment that may be needed from outside sources that are consistent with company policy
6. propose costs and schedules that are in line with the benefits to be obtained for the business and what the client needs to achieve
7. propose solutions to clients in ways that show how the features and benefits are attractive to them and meet their needs
8. give clients sufficient time to discuss proposals and their implications in full
9. respond to clients' needs and negotiating position with valid information, respect for their aspirations and an intention to resolve any differences
10. respond to clients' questions and proposals in ways that they will understand
11. record, track and follow up on correspondence in line with company requirements
12. agree with clients the work to be done, the timeframe, schedule and price in line with company procedures
13. complete and store contract information in line with company requirements
14. identify opportunities to offer additional services that will benefit clients and your organisation

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Knowledge and understanding

You need to know and understand:

1. how to understand clients needs beyond their initial requests
2. company strategy in terms of profitability, company profile (reputation) and developing or maintaining relationships with clients
3. project constraints including cost, required deliverables, timing and available resources
4. company policy and conventions for costing projects including rates for creative input
5. what can be offered that gives clients 'added value'
6. skills and equipment that can be sourced externally and company policy in relation to obtaining them
7. current viewing standards and current professional, national and international standards of delivery and expressions of best practice for the range of platforms and content
8. how to identify and balance your criteria for accepting projects such as profit, increased reputation, sufficient time to do a good job, working for particular people
9. workflow planning and choice of workflow
10. problems and risks associated with different kinds of project and approach and how to plan for contingencies
11. technical capabilities and the creative contribution that the people available can make to projects
12. who to consult for further information or guidance on different types of project and technical requirements
13. techniques of negotiation
14. when it is appropriate to advise clients to use more cost effective alternative services
15. company requirements for record keeping and contract documentation
16. company systems for storage, back up and security

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