

“Gee, I Wish Someone Had Told Me That!”  
*Levitan, NW Regional PTG Convention*  
*March 19, 2004*

There are two key issues to keeping your business organized: policies and records.

## RECORDS

There are five kinds of records that need to be kept, apart from bookkeeping.

Personal data is information on the customers and the people involved with the piano.

The service record is what was actually done on the piano.

The status record describes the piano's condition and issues.

### 1. **Personal Data** (people record)

This gets annotated and changed over the years

- Name of the piano owner, alphabetized by last name, and spelled correctly. Always ask for the spelling.
- Make a cross-reference list. For example, if the wife has a different name from the husband, list the wife's name cross-referenced to the husband's.
- Write down the kids' names, the year they were born, and if they are a boy or girl.
- Confirm data off their check.
- Write down the names of the kids, the pets, the housekeeper, etc., plus what they do.
- Who plays the piano, who pays for the tuning
- Did anybody complain? Who? About what?
- Mailing address, location address including directions.
- Phone numbers, including home, work, cell, other important people.
- Is this someone else's customer? Make a note.
- Does this have a Damp Chaser? When were the pads last changed?
- Is this a rental or a loaner piano?
- Where did they get your name? Keep track of referrals and ad responses.
- Who is their piano teacher.
- Institutions:
  - Contact name
  - Address for billing
  - Names of the maintenance people
  - Name of person who pays for the tuning.

### 2. **Service Record** (piano record)

- Categorize the type of piano so you know which types of tools and parts to take.
- Date of service?
- How much did you charge last time? How did you get to that number? Did you discount it? Did you do extra work? What was that fee for? Did you charge by the hour or by the job? Justify the price in your notes.
- Who paid you that money? If it was somebody different this is even more important.
- The serial number
- The finish
- The year.
- The pitch of the piano before & after tuning.
- The relative humidity and room temperature at the time of the visit.
- Keep the details of the service. Who did what? Did you spend time consulting? This keeps a history of what has been done, and reminds you of what you need to do next time.

### 3. **Status Record** (piano's condition)

- Make notes about how the piano is. For example, note loose tuning pins, a buzz, scratches, etc.
- Note the presence or absence of conditions, like sound board cracks, wandering center pins, loose tuning pins, and anything else that might be useful. Write down whatever you check or inspect.

### 4. **Flag** (temporary record)

- Write down things that are critical to the client.
- Note temporary conditions. For example, they owe money, they didn't show up, if you left a bottle of bactericide for their Damp Chaser, if next time you need to bring extra ivories, etc.
- Write down things that they are worried about or not happy about.
- Are they having a concert, a party or a recital?
- If they want to know the date built, tear out the page of an old Pierce Atlas & give it to them.
- Who is paying for the service?
- Do they have a particular preference, such as if they like it really bright, at A-442, etc.?
- Did you need a particular tool, like an unusual tuning tip?
- Work to do next time, parts or tools you will need next time.
- Where do they keep the house keys?
- Make a wish list of things you would love to have time to do on the piano.
- How long has it been since last tuned? How long have they had the piano? Who plays it?
- Did you discuss the fee?

### 5. **Piano Records**

- Place a service record somewhere on the piano, like in a side pocket inside the piano.
- Listed on this card is the make and model of the piano, the date, and the service performed.
- Keep another card that keeps track of what will be needed on the job. When you go on the job, make a list of all the tools and parts that you need, so that next time you can look at the list and see what to take.

## **POLICY**

You have to have a policy.

Always keep alert for frustration. That means you need to implement a different policy. For example, if you are working on a piano and you don't have the right tool, you would put that tool in your tool kit. The same goes for policies.

If I have tuned the piano within a year, I don't charge them for a pitch raise.

- **What if the client is not there?**
  - Set a time limit for how long you will wait.
  - Basically the policy is something that you are happy with and doesn't get you upset.
  - For example, if your policy is to charge half-price for a no-show, include that fee with the next tuning. You don't have to enforce your policy.
- **Call to confirm.**
  - Make a reminder call.
- **Surcharge for working late**
  - If they have to have it done by a certain time and you are making a special trip or working extra long, they understand that it might cost more.
  - Money is a tangible acknowledgement of our emotions.
- **How do you ring a doorbell?**
  - Touch the button lightly, and then mash on it so you know that you pushed the button. You don't want to wait and wonder if you even pushed it or if they heard it.
- **If they have to run to the store for five minutes, what do you do?**
  - When you are by yourself, act as though you are on camera. Sometimes you are.
  - If they say they will be back in a half an hour, they could walk back in any time.

- For billing, carry a stamped, addressed envelop and leave it with the bill on the piano.
- Ask where the bathroom is and if it's all right to use it. You have no right to go in any other room or to use anything without permission.
- **Noises and buzzes.**
  - If there is a buzz, it's part of my job to fix it.
  - Everybody gets a free return call, no questions asked.
- **Removing things**
  - Let them remove glass & delicate things.
- **Return calls**
  - You're paying me a slightly higher fee, but you're getting on-going service I'm like your doctor.
  - Being nice is good PR.
- **Price discounts**
  - Should you discount a piano teacher giving you referrals? If someone has more than one piano? If they tune their piano more than four times a year?
  - It doesn't feel good to discount people who don't have money. Instead of knocking down the price, give them something. Fix more things, spend extra time, etc. In this way your price is consistent, so if they refer others your fee is the same. Don't lower your fee. Give them your service. Don't undervalue who you are.
- **Talking to clients**
  - When you are discussing potential work that will make you extra income, do not charge.
  - When you are consulting with them about other things, the meter is running.
- **Donations**
  - Bill them for the full tuning fee and collect the payment.
  - Write them a check for the full amount. The net is now zero.
  - This is deductible as advertising.