Short and Easy

Estimate Guidelines

for Translators and Interpreters

Experience-based suggestions for #terps who need to provide meaningful estimates

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What these guidelines are about

After many years in the interpreting arena, I decided to share some information and suggestions about cost estimates for translators and interpreters.

These guidelines are intended to help you through the many intricacies of cost estimation, especially when it comes to language services.

I also hope you can use the guidelines to get to the gist of the client-service provider relationship, as it represents the backbone of any healthy commercial relation.

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Meeting the Client

A meeting with the client is probably the best way to start an estimate process. Let's see what steps we can expect.

Seeking Empathy

Have I listened to the client without interrupting?

Most people love to talk. When you let them, they exit your conversation with a positive feeling, which helps build your connection. The easiest way to show your new acquaintance you're interested in them is by listening and making an effort to find out more.

Has the client made all his/her requests?

If the answer to the previous question is yes, then the client may still have something to say. More often than not, folks would rather hear someone they meet talk passionately and openly about anything than force a stunted conversation.

Have I explored the reasons that make the client hesitate?

These may be a lack of knowledge about or experience with translation/interpretation, past poor experiences, huge prices charged for scrappy services, etc.

Is the client aware of the importance of professional translation/interpretation services? Have I suggested a tailored, personalized and yet scalable solution?

Remember, at the end of the day, you're both hoping to get something out of this relationship. So start off strong by finding a way to give away something that will be useful and meaningful to the other person.

Is he client willing to pay for quality services?

Be candid. Quality services do cost more. Made this clear to the client from the onset.

Offering (limited) Control

Can the client take control of business interaction with ease?

Always be careful with this part. Clients must be able to change things within certain limits; eventually, it's them paying you for services. What you want to avoid is to fall in the hands of clients who are control freaks. In order to do that, try to understand what drives their controlling behavior (fear to fail, perhaps); always be professional and neutral, and make it clear that you are both there for the same reason: success. Make this clear in explaining your offer.

## Is the cancellation policy flexible enough for that client?

A flexible cancellation policy can really help, but beware! Remember you have to travel, prepare yourself for assignments, do research. This are non-billable hours but should be in case of cancellation. Cancellation policies can be helpful for creating a revenue strategy and attracting more customers. With how competitive the translation services are, the benefits of a flexible cancellation policy far out weight any missed revenue. Agreeing to cancel a reservation is a great way to preserve the relationship and help encourage another contract in the future. When dealing with a cancellation request, taking things on a case by case basis is the best approach.

Building Value, Together

Focus On Growth Opportunities

You are not with your client to point out what they aren't or won't be doing well. Instead, focus on taking on the issues together, on identifying opportunities for growth, and on all those areas where you can make improvements together.
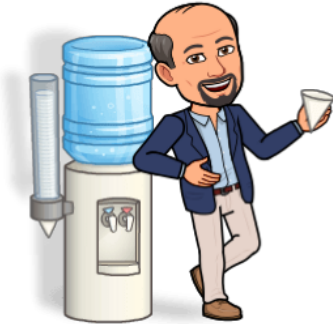
Conditions

Fairness

Are the conditions I apply to my estimate, contract, and performance fair to the client? Are they also fair to me? Do we have a win-win situation?

In order to prepare an estimate (and later, a contract) that contains fair clauses for you and the client, just put yourself in the client's shoes and consider his/her interests. Would you sign a contract having the same terms you are offering? This is why you have to write in a way that people understand (important note: always seed legal advice when drafting the contract). Still, in the estimate you can refrain from using legal or technical words and terms that most people do not use.

Clarity

Writing in a direct and concise manner helps to understand what you are offering. Also, no client wants to read endless information. Make and offer that is as straight to the point as possible and remember to highlight the most important points, as well as the terms and conditions. You may want to include a summary of the conditions at the top of the document.

Foreign clients

Clients may request an estimate from abroad, so always make sure that you are with the legislation that applies to your service in the applicable jurisdiction and triple check that your terms and conditions comply with the law.

Offering Options

Giving customers a choice makes them feel like they're in control and calling the shots. But too many choices can overwhelm them, so keep things simple.

Example of options include:

• channels: how can client reach you? Are you responsive on all channels?

- pricing: with multiple levels of service, and multiple prices.

- payment: do you accept credit cards, PayPal, money transfers, checks?

Information

Do my estimate and contract contain all the information the client needs?

As a minimum, your estimate should contain:

- a full breakdown of costs

- the overall price

- the schedule, detailing when translation work will be completed or products delivered

- terms and conditions

- time period the estimate is valid for

- payment terms or schedule

Do not forget to get **signed acceptance of your estimate** and verify your customer is aware of every term and condition. I always include a disclaimer stating clearly that the estimate's price may change. Your terms and conditions should also include a clause regarding the cost of any variations. These may turn to be useful whenever the client changes his/her requirements, or a job turns out to be more complex than expected. There is another option available: estimate by scenario. If you expect changes, or the client has been unclear about what's needed, just use IF-THEN-based scenarios. Don't forget to take note (and document) any cost over-runs, along with how and why they occurred.

Can I add more information to my wording, website, or social media channels?

That is good practice. Just review how your estimate, contract, and delivery have performed. Analyze them and look for improvement opportunities.

Transparency

How transparent does the client think my offer is?

Generally speaking, the answer to this question lies generally in the first part of these short guidelines: empathy. If you were able to establish rapport with your client, and explain how your offer is organized, what you offer and how much you charge for it, and above all what the client is going to get, you client will never think your estimate lacks transparency. Just be yourself, open up… and do your magic.

Conclusions

Estimating costs for the delivery of language services in an accurate manner is key to the success of our clients' projects.

Among the many challenges translators and interpreters face during their performance is delivering on all aspects of a project according to the client's specifications, budget, and deadlines. An old adage in marketing says you cannot have a fast, cheap, and perfect service together. In our profession it is often the case that either one aspect or the other cannot be accomplished. When it comes to offering estimates or quotes, appropriate cost estimations at the outset of a project are a critical first step to exceed the clients' expectations. Being able to control costs is largely a matter of adhering to established guidelines, oftentimes by learning from previous projects and reacting to current circumstances efficiently and effectively.

To summarize, there are two major concerns about estimates I would like to draw your attention to:

The customer does not know what he/she wants (i.e. requirements evolve).

As requirements change, or additions are made to the services' needs, presenting the client with realistic goals of meeting deadlines within the allotted budget can become challenging. In order to avoid this, assist the

client in making an informed decision by presenting their options clearly and reasonably.

The client is unaware of what a language service is.

As a general rule, clients don't need translation, until they do, and when they do, they need it, like, YESTERDAY.

If the clients have never used translation services before, they may be unclear about which type of service they need, or of the time and cost of translation. Many people even believe that translation is all done by computers instantaneously for free these days.

Estimates are too optimistic

Sometimes we could be tempted to provide optimistic estimates in terms of cost and deadlines. However, being realistic in a project is an important part of being clear with the customer as to what is truly needed to provide efficient and effective language services.

Surely, an optimistic estimate might help to get a project approved, but it will lead to problems as the project evolves. This is particularly true when people overestimate their ability to complete tasks, leading to tight project schedules that become difficult to meet, especially for translators.

Cost estimation will never be a perfect process.

The complexity of cost estimation problem is a natural consequence of the nature of our complex work. The most important thing is to get to a process that makes everyone satisfied (both the language service provider and the client). It's hard, but not impossibly so.

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About the author

Paolo Cappelli (@interpreterpaul) is a conference interpreter with 20+ years of experience based in Rome, Italy who often travels to the US. He graduated in Conference Interpreting and in Journalism, and holds a MBA Degree from St.John's University, NY. While his passions span from international business to communication, he loves to focus on strategy and advice to companies and interpreters/translators to improve their performance in an international setting.

His main fields of work include diplomacy, public policy, military issues, and technology. Paolo has worked for several public and private clients including - *inter alia* - the President of the United States, the President of the Italian Republic, the US Embassy in Rome, and SKY news.

Paolo is very active on social media, manages his own blog and is the editor of a wide-encompassing e-zine, The Interpreting and Translation Herald, which is published three times a week.

Common hashtags in my e-books

#1nt for interpreting

#xl8 for translation

#terps for interpreters

#mil1nt for military interpreting

#r1nt and **#RSI** for remote (simultaneous) interpreting

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