

Rick Freedman offers a practical guide to client relations in his book *The IT Consultant: A Commonsense Framework for Managing the Client Relationship*. The framework he shares is designed as a touchstone to guide your thinking as you engage with your clients. It consists of the following seven stages:



Although the sales activity that occurs prior to engagement is obviously critical (for without it there would be no engagement), this framework begins when the sale has been made and the client is ready to start the actual consulting process. In this “mini-white paper,” Freedman explains the first step of that framework: how to approach the client. While this initial contact can range from a short meeting that is little more than a handshake to a lengthy facilitated work session with a team of client representatives, it is a critical stage in the path to a working advisory relationship. This white paper will explore both the formal agenda and the mutual assessment process that inevitably takes place. It also includes an Engagement Profile Form, which can be used to document your initial meeting with a client.

## Approaching the Client

*A bad beginning makes a bad ending.* —Euripides

### Why do clients engage consultants?

There is inherent tension in the initial meeting between any two people. No matter how self-assured, confident, and experienced an individual is, approaching an unknown person causes some degree of apprehension. Will this new acquaintance be friendly or cold, cordial or rude, open or reserved, wise or foolish? Will my ego be soothed, threatened, or bruised by this encounter?

Now imagine how this anxiety is magnified in a business setting, where livelihood, prestige, and power are at risk. By the time a client approaches a consultant for advice, that client has acknowledged some things about himself and his organization, which may not have been easy or flattering. The client may have recognized some or all of these deficiencies in his organization:

- They lack the technical expertise to solve their problem without outside help.
- They lack the business experience to apply whatever technical knowledge they do have.
- They lack confidence in their ability to evaluate the options.
- They can't convince their management or team that a particular solution is valid, and so they need independent verification.
- They don't have the staffing or the time to address the problem or opportunity.
- They doubt their ability to implement the solution.

IT consultants must take care not to assume that lack of technical expertise is the only issue. As a technology consultant, it's easy to conclude that the client wants to buy your technical knowledge and advice. IT consultants—when developing a relationship with a new client—need to keep in mind both the inherent anxiety of the initial human contact and the full range of deficiencies with which the client may need help.

## Assessing the potential for success

The initial client contact is an assessment session as well as a work session. The formal agenda for an initial client meeting is always focused on the project issues, such as objectives, scope, fee arrangements, and the like. But the client and the consultant are also evaluating each other. The client is seeking technical competence, of course, and questioning will typically center around that. But the client is also wondering, “Can I trust this individual? Will she work well with me? Does she understand what I need to get from this relationship? Will she fit into my corporate culture?” Of course, the consultant is also stepping through a range of concerns: “Does the client understand how to work with consultants? Does he understand the technology well enough to make the necessary decisions? Is he interested in partnering in this endeavor, or will he come looking for a ‘blame agent’ if things go wrong?”

As expressed by Euripides in the opening aphorism, the outcome of the entire engagement can be tainted by poor handling of the initial contact. On the positive side, consultants can tip the scales significantly in favor of success through thoughtful treatment of the initial sessions. As consultants proceed through this dance of evaluation and counterevaluation, we should consider the following questions:

- With which of the deficiencies described earlier is the client asking for help?
- What is the client's demeanor? Is he casual and open or formal and restrained?
- Are there any clues to indicate the client is pressured for time? A client who appears rushed and must run to her next meeting will participate in the project in a different way than a client who relaxes and wants to go into great detail.
- Is the client excited and enthusiastic about the possibilities of this engagement? Or does it seem like another burden that got dumped on the client without his consent?
- Observe the setting carefully. What are the physical clues? Does the client's office have his child's finger-paintings on the wall, a fine art poster, or a picture of the local football team?

Using powers of observation effectively is one of the critical success factors for a consultant. Important clues can be gathered from observing the client's reaction to the simplest of questions, such as “Where shall we meet next?” or “Who should be in our next meeting?” If the client wants to get out of the office to have your next conversation, how do you interpret that? Does it mean that the client wants to avoid interruptions and give you her complete attention? Or does she want to make sure her officemates don't hear your conversation? Is the client including or excluding staff based on their need to participate or to protect her own power and prestige? All of these questions demonstrate the nuances of human relationships that are at the heart of every engagement. And, as when you first meet your brother-in-law or your new auto mechanic, you must use your sum of experience and your own character to make these interpretations.

It's obvious that if either the client's evaluation of the consultant is negative or the consultant doesn't feel he can work with the client effectively, the relationship will never get off the ground. There are some simple rules a consultant can follow to positively influence the client's evaluation:

- **Give confidence to get confidence.** Tell your client about yourself and be forthcoming and engaging if you want your client to reciprocate. This refers not to the false backslapping that is typical of the huckster but to a genuine attempt to connect as an individual with the client. Help the client understand the advisory process he is about to engage in. Help him see the context of the questions you ask. Help him understand why you need to know and what you will do with the information. Give him an opportunity to ask his own questions.
- **Don't push the river.** Let the story either trickle or flow in a torrent as the customer desires. At this stage of the relationship, don't be too concerned about getting the total picture. As we engage, we will follow a process for performing a full analysis. Don't budget too tight of a time frame for these initial contacts so that you won't feel the need to push the client through the process. Listening, caring, and not taking undue control of the conversation are critical to building trust.
- **Don't prescribe before diagnosing.** Inexperienced consultants want to assure their clients that they "get it" and that they have a solution on the tip of their tongue. And often, veterans who have seen similar situations so many times before feel they know the answer by the time the first sentence is uttered. Resist both of these impulses. Talking later and less, but talking judiciously and with complete knowledge of the situation, is the sign of a skilled advisor.
- **Test your understanding.** Repeat the client's goals and concerns in your own language to ensure that your interpretation and the client's are harmonious.

As I have repeatedly emphasized, these human interaction issues are key success factors in any advisory relationship. IT consulting, however, is still a technical discipline, and it requires of the consultant that she not only develop a rapport with the customer but also that she clearly understand the business situation she is walking into. In many instances, the consultant is but one member of a team that will be addressing the client's needs. Additionally, if the consultant works for a professional services firm or inside a corporation, she has a management chain to which she must report. For all of these reasons, it's critical that a structured method of profiling the engagement during the initial contact is required. Don't confuse this task with the full-analysis activities that come later in the process. This is the preliminary contact, but it must be fruitful and complete in its purpose, which is to take the initial measure of the engagement.

## Engagement Profile Form

Company Name \_\_\_\_\_

Project Sponsor \_\_\_\_\_

Project Sponsor's Title \_\_\_\_\_

Initial Project Statement \_\_\_\_\_

\_\_\_\_\_

Business Objectives \_\_\_\_\_

\_\_\_\_\_

Compelling Event \_\_\_\_\_

Preliminary Schedule \_\_\_\_\_

Other Major Projects? Comparative Priority \_\_\_\_\_

Out to Bid?  RFP?

Decision Criteria \_\_\_\_\_

Why Us? \_\_\_\_\_

\_\_\_\_\_

Existing Relationship?

If Existing Relationship, Describe \_\_\_\_\_

\_\_\_\_\_

Other Comments \_\_\_\_\_

\_\_\_\_\_

The **Engagement Profile Form** above shows one way of documenting your conversation with the customer. Some consultants will present a form like this to the customer before the meeting and ask that it be filled out. For me, this smacks too much of assigning homework to the client, so I'll present it right before our meeting and tell the client that this is the type of information I'll be looking for. It can then be used as an agenda to help lead the client and consultant through the initial meeting.

Many professional service firms provide their consultants with customer questionnaires that are much more detailed and extensive than this. However, by focusing on the baseline factors listed above, we assure the client that we're not turning this mutual evaluation meeting into an interrogation. We also assure them that we're not trying to jam the entire analysis phase into one meeting. If the client is particularly cooperative or enthusiastic, these questions will naturally lead as deeply as the client wants to go.

The initial meeting is the place to request any additional data you'll need in later phases. Bring a list of documents you'll want to review, including technical data such as network diagrams, application manuals, policies and procedures, or contingency plans, as well as corporate data such as organization charts or annual reports.

It's also critical that the engagement be put into the context of the client's overall business strategy from the start. I've always been amazed at the number of technical consultants who will meet with their customers, have detailed conversations about system requirements, data, and applications but can't tell me what business the client is in. Just as a patient would not be comforted by a doctor who only treated the injury and not the person, a consultant who only addresses the technology issues without understanding the business context will not gain the customer's confidence. Always remember that clients are applying technology to serve a business need. By gathering the data required to fill out the Engagement Profile Form, we demonstrate that we're business advisors and not just "techs for hire." This elevates our value in the client's mind from the inception of the relationship.

Remember that the role of an advisor is a role of influence and power. Like in any such role, there is the potential for harm as well as good. An IT consultant is a professional and must follow a professional code of conduct. In many cases, the client is inexperienced in partnering with a consultant, is in an immediate crisis and is reaching out desperately for help, or does not understand the technology. In each of these cases, the client's judgment can be clouded. It is up to you to advise your client well, not only within the technical disciplines but also within the advisory relationship. If the client is engaging with unreasonable expectations, is clutching at straws to save his job, or is expecting magic instead of technology, you need to identify that. This meeting may not be the appropriate forum in which to raise those issues, but at the least, they must be recognized. Even if you just "can't work with this guy" for whatever reason, you need to take that impression seriously.

The consultant's responsibility to assess the potential effectiveness of each engagement must be taken in earnest. Just as a scrupulous judge will recuse himself from trying a case in which he cannot render impartial justice, an ethical consultant will sometimes need to walk away from an engagement if there are factors that make it impossible or unethical to continue. It is an exercise in frustration to engage with a customer that we can't advise properly; it's also a breach of professionalism.

Your initial contacts with the client must result in a deliverable, such as the Engagement Profile Form. You should have a record of the problem, opportunity, client's requested services, and all of the other basic information outlined here, and you should use it to open a project file. If you are a member of a consulting team, you should hold a team meeting to review the information you've gathered and to begin the process of defining a scope of work, a task list, a schedule, and a budget. Solo practitioners should also get into the discipline of preparing written records of their client interactions.

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