

# me293 – Project Management & Social Responsibility

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## Working with Clients

### **Clients Are Different Than Other People You May Work With**

- You likely won't see your client all that frequently so it is often a challenge to develop an easy, trusting working relationship.
- They have desires. After all, they have hired you and your company to do work on their project. They will ultimately take ownership of the result of your work so it makes sense that they care about what you do, how you do it, how much you will charge and the quality of work you produce.
- They pay for everything. That's their job ... among many other things. The act of being the payer sets them apart from pretty well everyone else you work with, including the company you work for.

### **Clients Have Certain Personality Traits**

- Some clients are hands-off people and so are very, very hands-on.
- Some can make decisions and stick to them others float around changing their minds.
- Some communicate their ideas clearly and some are introverted, non-empathetic people who can't string whole sentences together.
- Some are flexible and open to altering the project based on your ideas and some are super rigid and won't change a thing even if the project is going off the rails.
- Some are easy going and can handle adversity in a calm, rational way while others get mad and emotionally blow-up at the drop of a hat.
- Some are intelligent people with accurate memories who also listen well and some, sadly and dangerously, are quite the opposite (are not smart, may forget, alter or totally fabricate memories and can't remember what the heck you talked about).
- Some clients have a thing about money – they hate to part with it while others feel an obligation to pay right away, usually without question.

Working with a new client makes me tense.

There are so many unknowns.

Since one spends little time with a client, there isn't much time to figure out how to work with them.

What is a person to do?

## Here Are A Few Tips That I Have Used Over the Years

- When you first meet a client to go over a new project you will chat. I ask:
  - Do they listen? If the client interrupts you and seems to only half listen, then make sure you put everything you have discussed into a dated letter or email as a polite 'follow-up' to your conversation.
  - If they fail the 'do they listen' test, do the 'are they remembering test'. Later in the meeting try and ask a question of them that requires them to repeat something that was talked about earlier. If they get it right, super, if they don't, they fail. In this case escalate the feedback. At the end of the meeting summarize the points discussed and decisions made and also do the follow-up dated letter or email.
  - Once you have considered the project (not at the first meeting) you may have things you want changed or ideas you want implemented. Organize a follow-up meeting or phone call (not email and especially not texting). During the follow-up, gingerly and gently introduce your new ideas. Start with non-critical ones as a test. You are testing your client for open mindedness and flexibility. If they are rigid thinkers your ideas will fail to make an impression. If your client is a flexible, open thinker then your ideas will be heard, discussed and sometimes accepted. Your objective here isn't to get your way. Your objective is to test your client and, if he/she passes the test, then to carry on and have an interesting discussion about the new ideas.
  - If a client is a very hands-on manager or is so interested in what you are doing that they bug you all the time, here is one thing you can try. Break off a little bit of the project and 'Give your Client a Project'. Yup, that's how I think about this process. Your client needs a job so he/she gets out of your hair for while. Something like, digging up some hard to find piece of information or doing a little follow-up communication are good tasks. You don't want them to catch on to what you are doing. Be respectful and make sure the task they are asked to do is something they can actually do. Good clients will take a few days to finish their little job, irritating clients will call you back with an answer in 10 minutes and your strategy will have failed.
  - Train your client as to what to expect from you. For clients, you like and respect, email them right back. They will appreciate it and grow to expect it. For clients that are over-communicative or simply a pain, be a bit slower with your reply. A reply the next day is good. They will never complain. They will just think you are busy ... which you are. Training expectations works.
  - Always do expectation control. As a project progresses, you will see problems arise well before your client does. As you see a problem that will affect or simply be noticed by your client, pick up the phone and call her/him. Explain what you expect and what you and others are doing about it. When the problem actually appears, it won't be a big deal.
  - Guide your client along. As the project progresses send little updates so your client gets a sense of motion. It goes along with the saying ... 'if you work late and the boss doesn't know about it, does it count'. Sadly, the answer is no, your extra work and effort doesn't

count. You have to communicate, in subtle, non-egotistical ways, that you are working like mad on their behalf.

- If your client is stupid, ha, poor you. Write his/her name down and never work for them again. That's a rule. There are lots of clients. After a time, you may be able to afford to be a little bit selective. (This suggestion also applies to irritating, obnoxious clients too. Plus, ones who have a hard time paying on time. Oh, and ones who are very rigid thinkers.)
- Try and set your delivery deadlines for a Friday afternoon. If you run short of time (a normal thing) you can dash off an email at 4 pm Friday saying you will deliver first thing Monday.

Since your client doesn't work on the weekends, **Friday @ 4 pm = Monday @ 8 am.** You work like mad over the weekend and get the job done.

- If a client is slow to pay be a little patient. There are a great many financial pressures on clients involved in large expensive project. If you are concerned give your client a call and see what's going on.

If they neglect to pay or, worse, refuse to pay, sue them.

### **Be Sympathetic to Your Client**

As something of a last word on working clients, I'd like to add that you should try to be a little sympathetic and forgiving to clients. Most contractors to very mediocre work and even good-people clients get sick and tired of working with people who do poor work, deliver late and charge too much. Clients are often suspicious of everyone who starts to work with them. Be one of the good people and let your client know you are one of the good (easy to work with, deliver quality work, on time, have good, constructive ideas) and after an initial caution your client will warm-up and open-up.

If you do a good job and are nice, often your client will become that too. They are not all bad.