

Clients

We all have them, we all want them. What do we do with them?

By Darin E. Hartley

WHEN JIMMY BUFFETT SINGS about relationships, he asks, “Relationships. We all got ‘em, we all want ‘em. What do we do with them?”

It’s a good sentiment, and it makes me wonder if he’d ever worked in a services business. (The line works just as well if you begin with “client relationships.”) Each of us in the workplace learning and performance industry deals with clients daily—whether you work in-house, as an external consultant, or as a supplier.

At some level, we all have—and want—clients. But at times, we can’t figure out how to manage the relationship. I’d like to attempt to shed light on the subject. Before I begin, let’s make one thing clear: Before I begin, let’s make one thing clear: If we’re going to take an objective look at client archetypes, we must be prepared for our clients to hold a mirror up to us. So, try to maintain a semblance of modesty and empathy as you read on.

The research

As a consultant, I work with a variety of potential and actual clients. No two clients are alike. Each client has his or her own environmental, technical, organizational, political, and industry lenses that color his or her viewpoint. As I work with clients, I’ve started to wonder if there might not be a core set of archetypes for difficult clients. I reflected on some of the types of difficult clients I’ve had, asked peers and other professionals to add their own thoughts, and came up with a good straw list of categories.

I also created a web survey and polled a group of peers and professionals to gather their insights and thoughts. Some of you reading this article may have participated in my survey. (See page 67 to review the survey questions.) I was also able to interview a few survey respondents to get additional information.

The archetypes

My research resulted in the creation of the following client profiles:

The Know-It-All. These clients have figured out everything about everything. They understand the problem they’re trying to address. They know all potential solutions that exist—and how to implement them. Most important, they don’t want to delegate project authority to you. Know-It-Alls often view you as a “pair of hands” to get work done. They may say things like, “I could get this project done myself in two hours, but I don’t have the time right now.”

The Miser. Not only do miserly clients find it difficult to part with money, but also they analyze, question, and re-analyze every element of cost. It often takes a long time to start a project with such clients because they’re shopping the project around to multiple vendors or partners trying to leverage the absolute best deal possible. Their wheeling-and-dealing nature can cause a delay in solution implementation or minimize the business impact of a solution.

The Passive-Aggressive. The Passive-Aggressive client has extreme mood swings over the life of a project. At one project meeting, the client can be extremely easy-going; at the next, he is extremely angry. I have worked with some clients who can morph from passive to

aggressive and back to passive several times in the same one-hour phone call. The biggest detriment of working with Passive-Aggressives is that you’re never quite sure which client personality is going to show up. That stress makes preparing for client meetings a chore.

The Zero Feedback. What is the sound of one task collapsing? I don’t know, and my Zero Feedback clients won’t tell me because they value silence. They won’t provide feedback on either the project or your deliverables. While that may seem like a blessing (The client is giving you a lot of leeway), it can often lead to huge problems in the latter stages of a project.

The Visionless. Some clients are so burdened by their immediate needs that they can’t or don’t want to see expanded or alternative solutions. They are quick to say, “That wouldn’t work here,” or “We don’t operate that way.” Clients without vision, generally, require extra communication, lots of mock-ups, and story boards to be convinced about the best way to reach the end state. In some instances, that’s why clients hire consultants: to help establish a vision. But, if there’s a complete lack of vision, then there can be project issues, especially around vision alignment.

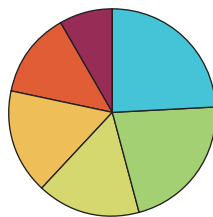
The Over-Positive. This client is so positive that he or she cannot hold up the lens of reason to any project-related work. Expect unachievable timelines associated with project deliverables with these types of clients.

The Nonresponsive. The Nonresponsive client is quick to drop in during the initial stages of the project, but she’s equally quick to drive away—making her difficult to access during the project lifecycle. That creates project timeline slide.

The Over-Supportive. The opposite of the Nonresponsive, the Over-Supportive client offers too much support. He often communicates with you so frequently that it can be difficult to complete project tasks.

The Negative. Cynicism on a project can make even the most interesting project a difficult one. Negative clients can sour the

A Sample of Survey Results: Where the Issues Lie



- 24.3%-Communication
- 21.6%-Vision alignment
- 16.2%-Project scoping
- 16.2%-Execution
- 13.5%-Project management
- 8.1%-Other

chemistry of the most high-performing project teams. These clients also create emotional drag on the team and increase the amount of time the project manager spends mending emotions.

The Transactional. Like the Know-It-Alls, Transactional clients often view the suppliers and contractors as an extra pair of hands. Frequently, they use you to complete menial work. Transactionals are also inflexible about project details, which includes timelines, resource planning, deliverables, and so forth. Invariably, issues arise that create the need for flexibility. Transactional clients rarely negotiate project changes because there's no relationship outside the project.

The Noncommunicative. As the descriptor implies, these clients don't communicate. They're tight-lipped about contracting, statements of work, project status, deliverables, and final work products. Even with the availability of pagers, cell phones, and email, these clients make everyone working with them a little crazy from lack of communication. (At least, negative communication provides some level of valuable feedback.) Noncommunicative clients leave you questioning everything about you, your work, and the project.

The Noncommittal. These clients never seem to become fully engaged on a project. Noncommittals may have been passionate at the beginning of the project, but, frequently, they have more pressing requirements that consume their focus, which creates the Noncommittal perception.

All of the profiles above were included as part of my web survey. Survey respondents had the opportunity to add their own customized archetypes. Additional client types include

- the Always Changing client
- the Unclear About What They Want client
- the Disengaged client
- the Cost-Focused client
- the Lacks Authority client.

The results

The first question on the survey asked, "When you typically have issues with your client, what category do they fit in?"

- Communication

- Project scoping
- Project management
- Vision alignment
- Execution
- Other—including setting expectations and too many people trying to run the project.

Refer to the sidebar on page 64 to view the results.

The results weren't shocking to me. Combining the percentages for project scoping and vision alignment results in a 37.8 percent total of all issues. That means if you don't scope a project appropriately and nail the vision alignment with your client at the beginning, there's more than a one-third chance that you'll encounter issues later. Issues that appear early in the process often snowball through the end of the project. Of course, effective communication throughout the project lifecycle is key.

The next question on the survey was, "Which of the client archetypes are the most difficult to work with and why?" The answer: The Know-It-All.

Not only is the Know-It-All the most difficult to work with—at 29 percent—she's also the client that survey respondents noted they interfaced with the most. Specific feedback related to Know-It-Alls include

- "Not open to new ideas and approaches."
- "Often oversteps his or her role."
- "Basically, [Know-It-Alls] have determined what the 'training needs' are without tapping into the resource who can best assist them with the analysis of the problem and offer them some solutions."

Next on the list—at 19 percent—was the Nonresponsive client. One respondent noted, "[They're] difficult to work with because [they] don't [provide the] feedback to ensure that you're on the right track to reach your goal." Another added that "when you aren't the subject matter expert, you need the information."

Third on the list of difficult clients was the Visionless client—at 16 percent. Following are some of the specific comments associated with this particular archetype:

- "Without a vision it's hard to get a client to make a decision and move. It also makes it difficult to have a successful project if the client doesn't know what suc-

cess looks like when it is completed. We spend a lot of time trying to help the client engineer a vision for a project."

- "Because they lack the imagination to see what could happen, [the Visionless] lack the ability to separate past experiences from the present; therefore, they miss opportunities to identify improvements, changes in industry, and employee receptivity to learning new things. Most of the others archetypes can be 'handled' by effective time-management and communication techniques ... Being Visionless is more of a mindset that can only be altered internally, rather than with the application of outside forces or process."

It's more difficult to help clients envision the possibilities if this archetype is evident.

Other profiles, in order of frequency:

- the Zero-Feedback and the Passive-Aggressive—at 10 percent
- the Noncommittal—at 6 percent
- the Over-Positive and the Lacks Authority—at 3 percent.

One of the most salient bits of feedback in this grouping was related to the Lacks Authority client. A survey respondent wrote, "More often than not the Lack Authority client doesn't want to be the client, has the attitude that he doesn't have time for this, and would rather do it himself (or in-house). Basically, he feels as though 'I am so busy, and now I am told to deal with you? Just get it done.' If not managed, that [attitude] leads to massive scope creep. [You] need to have strong project management skills as well as the personal character to 'show' this person you're working with him for his gain."

Survey respondents supplied many responses to the question, "What strategies do you employ with the most difficult archetypes? (See page 68.) Some similar threads emerged: effective project management, consistent communication, and mapping to business objectives. All good suggestions, but the key is to use the appropriate behavior to leverage the strengths and opportunities of each client.

One respondent provided valuable insight into how to manage subject matter expert expectations:

"After sending [out] review document

after review document—with deadlines for [my client] to meet, I finally realized that the documents were a bit overwhelming for SMEs who already put in 50 to 60 hours a week. I set up a call with the lead SMEs to walk them through the document and give them a sense of the type of feedback I was interested in [receiving]. I got several aha [moments] on the call, so I hope it will yield some good feedback.”

The last item on the survey was, “Please provide any other comments or feedback you might have related to clients and client relationships.” Respondents provided some interesting recommendations:

- “Maintaining relationships with [your] clients is key. Clients need to feel that you care about them and their business. We try to do all we can to make a client look good to their boss and peers, so that they get credit for making the right decision on a project.”
- “When an environment is tenuous, people sometimes get territorial and desperately try to become acknowledged as a valid person. My goal is to have them see me as a team leader or partner instead of an advocate.”
- “Up-front scoping and defining mutual accountabilities is the most time-consuming and difficult part of any project. But, if not done well, it results in ongoing disagreements and misunderstandings that negatively [influence] both the committed deliverables and the client relationship.”

A client story

Responding to the survey question, “Describe a client story that demonstrates how you dealt with a client represented by one of the client archetypes above,” Lester Stephenson, a technical trainer for Hayssen, an international packaging technology and services company headquartered in Duncan, South Carolina, shared a fascinating tale of how he interacts with clients.

“I visit manufacturing plants to install and service vertical and horizontal packaging machines and attached feed systems—conveyors, augers, volumetrics, and scales. My principle duty consists of training customers to operate and maintain their machines.

While my training responsibilities are primarily machine operation and maintenance, a trip to a customer’s plant involves much more. I observe the way they operate, study the flow characteristics of their product, and conduct a basic appraisal of their packaging materials. Following that, I teach them how to get the full benefit of the capabilities of their machine. In every case, their production process improves, leading to savings by reducing waste, product give-away, and rework. In many cases, customer production problems exist in other areas of their packaging line, plant, organization, or operating procedures. I always address those issues in a peripheral manner, and, if the customer desires, offer suggestions and solutions.

One recent visit was my second trip to a cookie factory to train the remainder of their staff. I noticed they hadn’t implemented most of the recommendations and training from the earlier visit. I called a meeting with the plant manager, operations manager, and maintenance engineer. I explained what I saw and made sure they understood they weren’t getting a return on their training investment.

That led to me chairing a meeting of key plant personnel and production workers. In the session, I led them to recognize they had three major problems:

- Almost no communication existed between shifts.
- Workers were afraid to experiment with their new knowledge for fear of reprimand for slowing production.
- Existing machine set-up instructions were often unrealistic and designed without consideration of limitations imposed by their product, feed system, and machine capabilities. In some instances, set-up and operating instructions actually slowed production, adding additional stress on the workforce.

A fascinating dialogue opened between plant personnel, and I was able to minimize my role in the meeting.

The result was a commitment by top management to allow the employees the opportunity to practice their new skills without fear. The group laid the groundwork for a workable plan to improve cross shift communications.

In the three remaining days I was in that facility, I watched them implement “their” plan. The results were astonishing:

- Packaging material waste was cut in half.

- Product give-away was reduced.
- Packaging speeds increased 15 to 25 percent, depending upon the product.
- Rework dropped to the lowest levels in plant history.
- Some products became nearly nonexistent.

That factory’s staff became so efficient that they had excess packaging capability. I pointed out to management how the excess would allow the opportunity to take machines down for preventive maintenance without effecting production schedules.”

Personal tenets

Here are some of my personal client relationship tenets (some of which I’ve learned the hard way):

Overcommunicate. That ensures vision and project alignment.

Communicate the good, the bad—quickly. Often in trying to do damage control on a project, honest and straightforward feedback to the client is key. That helps set appropriate expectations if project timelines start to slip.

Push back on the client—appropriately. Just because a client says he needs a solution “yesterday,” don’t hesitate to dig into the real need and the real timelines. Some thoughtful “why” questions can help the client get a more realistic deliverable or release date.

For example, if a client had the entire curriculum available today, would it be possible—from an operational perspective—to have all engineers, sales personnel, and so forth to attend today? This week? This month? This quarter? How are you going to create stickiness around the curriculum if it is all released today? Leverage the operational realities of organizations to help set appropriate expectations.

Use iterative models and processes during client engagements, when possible. One way to help minimize variances in client and consultant, contractor, or supplier vision is to provide iterative or straw models frequently during the project lifecycle.

That minimizes the chance of a big surprise when the final project deliverable is provided to the client. It also gives the client more “ownership” of the end-deliverable. If a client has her fingerprints all over the deliverable, you’re less

likely to have vision misalignment at project close.

How to deal

We all have clients, we all want clients. But sometimes, we aren't sure how to deal with problem clients. The key is to decipher the profile of each client or potential client and employ strategies that minimize client relationship stress.

Remember, each of us will take a few missteps with our clients. But if you acknowledge and address issues quickly, you can use any misstep as a learning opportunity. All of the archetypes detailed here could just as easily apply to

services providers. Before you become too judgmental, make sure that you aren't, in fact, a problem supplier by providing the best possible service that you can. **TD**

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“What strategies do you employ with the most difficult archetypes?”

While it's important to know the prominent client profiles that exist, it's also important to know how to deal with each of them. Survey respondents provided some great insights. Here's a sampling:

“We try to identify the [client's] reason for doing a particular project. The bigger the reason or 'pain,' the more important the outcome of the project. When the pain isn't great, the client's commitment to success waivers. We try to help them see that pain, who it affects, and what a successful solution looks like.”

“I try to engage [the client] and show them the positive result of implementing a suggested vision. I try interactive techniques that [generate] creativity. But if it isn't [a part of] their direct world and scope of knowledge, then it doesn't matter to them. I try to put it in their lingo, even if the needed vision departs from their current state of mind. I partner with various subject matter experts to demonstrate to the 'Visionless' that I get it and that I get them.”

“[I] manage the project to strict milestones and deliverables, and separate the project from the person. Don't take it personally. Find an ally, someone with the authority and motivation to help drive the project. Let your credibility (that is, the combination of personal character and technical expertise) shine.”

“[I] show numerical data that reinforces the expected results, and I align with more visionary personnel who can influence or make decisions.”

“Highlight the costs of business, as usual.”

Survey Questions

1. When you typically have issues with clients, what category do they normally fit in?

- Communication
- Project Scoping
- Project Management
- Vision Alignment
- Execution
- Other (please specify)

2. Please select the top three client archetypes with whom you interface:

- Know-It-All
- Miser
- Passive-Aggressive
- Zero-Feedback
- Nonresponsive
- Visionless
- Over-Positive
- Over-Supportive
- Negative
- Transactional
- Covenantal
- Noncommunicative
- Noncommittal
- Other (please specify)

3. Which of the aforementioned client archetypes are the most difficult to work with in your opinion and why?

4. What strategies do you employ when working with the most difficult client archetype you chose above?

5. Please describe a client story that demonstrates how you dealt with a client that represented one of the archetypes above.

6. If you are willing to be quoted in a magazine article, please provide your email and phone number so that the article author can speak with you to get additional information as needed.

7. Please provide any other comments or feedback you might have related to clients and client relationships.