Cliff Notes for Client Relations

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Consultants make their living through making clients happy. Whether or not you're a consultant, these tips for successful client relations can move your performance to the next level.

Introverts need not apply

Many consultants are fresh out of top schools, eager to make their mark in the business world, and very, very smooth operators. They may lack industry knowledge or have a lot to learn about the fundamentals of big business, but they know how to interact with people. No one gets a job offer in consulting without having a penchant for people-to-people interaction. Clients absolutely demand it, and consulting firms consider it a prerequisite for the job.

Consulting firms actively screen candidates for the ability to establish professional relationships, handle pressure, and communicate effectively. Consulting interviews, apart from being tools to learn a candidate's background, are meant to test these skills and see how candidates will perform in front of clients. The whole experience is a simulation, where the candidate plays the role of consultant, and the firm sits back and judges what they hear. Did you structure your thoughts? Were you comfortable answering complex questions? Were you convincing?

The most common mistake for would-be consultants is to overexert themselves, focusing entirely on the questions and forgetting to treat the "clients" like real people. Clients want more than long, hyper-logical answers to every question. They also want to make small-talk, trade stories, and feel as if they are a valuable part of the conversation. Consulting interviewers are on the look-out for anyone who, despite being extremely intelligent, cannot communicate in a way that makes the client feel involved and appreciated.

Making it through the interview process and receiving a job offer represents a passing score on a test that occurs every day in consulting. Of course, clients are often twice as demanding and create far greater challenges than anything experienced in consulting interviews. Consulting training, therefore, is geared heavily toward preparing new hires for an ever-demanding professional experience. Being smooth gets you in the door, but it's only a foundation for the advanced skills you will need down the road.

The client is always a client

There are many lessons to learn about client relations, and in a fast-moving industry like consulting, the learning never stops. New hires have been known to find it overwhelming at first, the sudden immersion into a giant company, the first meeting with a client contact (who's twice their age), and the steady stream of dinners where wine flows like water. How does one manage all of this? Is it all about the quality of work or the client relationship? Are we in charge of the project or are they?

Although at first it may be difficult to simplify a project experience or even comprehend its scope, there are certain implied rules that experienced consultants never forget. The first and most important of these rules is that the client is always a client. Consultants cannot afford to let down their guard and say whatever comes to mind, just because they are out to dinner with the client, playing a round of golf, or meeting away from the office. While this may seem obvious, consultants do forget this from time to time. Consultants go to dinner with a client, have a few drinks, and say very candidly, "You know, Mike, your boss is a complete idiot. How do you work with that guy?" The client nods his head, says he understands, and the next day, all of a sudden, the loose-lipped consultant is removed from the project. Turns out the consultant was a little too casual about his million dollar project, and the client didn't appreciate the mean, half-baked comments about his boss.

College is over, so get over it

For consulting managers and partners, the essence of consulting has little to do with locating a client's problems, identifying solutions, or driving large-scale change. Consulting, at it's fundamental core, is about completing the terms of relationship, making the client happy, and getting a referral for more business. That is the primary focal point of consulting engagements. Consulting executives know that all of the brilliance in the world doesn't matter unless, at the end of the project, the client is happy.

Some consultants have a hard time understanding this. Armed with their Fullbright scholarships, valedictorian plaques, or reputation for solving difficult problems at the speed of light, some consultants wonder, what's the value of approval? Did I need to be popular to get straight A's in college? Of course not, and the client, they think, has a choice. They can be an asset, or they can be an obstacle. If they chose the latter, we steam-roll every initiative until the project works, until the whole thing is humming along like a well-oiled machine, and to hell with making the client happy. Right is right, and if people can't swallow that, they're in the way.

One little problem with that approach - the client, it turns out, is signing the checks. The client, it also turns out, has the power to support, or not support, every single initiative the consultants so brilliantly suggest. Anger the client and you may as well start writing the project's obituary. Try to brush aside a client or scoff at their ideas, and you might want to dust off your resume. Consulting
executives will not tolerate client-bashing. Like it or not, the client is central to consulting projects. Consulting may have the allure of being a think-tank experience with no running commentary from outside observers, but that is only half-true. The reality is that clients are involved in the process nearly every day, that factions within companies have power (and need to be neutralized), and that right answers, no matter how impressive, are worthless without client buy-in.

**Embrace the client's mistakes**

Many consulting engagements are held in the confines of large, corporate headquarters where organizational clarity is, in theory, supposed to exist. Upon arriving at a client site, consultants are often taken aback by the lack of process, frustrated by the poor communication between departments, and shocked that no one seems to care. How the hell does this place make money?

For experienced consultants, walking into a project and seeing nothing but corporate confusion is all part of the job. It's what you live for, what creates opportunities. The more mess you find, the better. More confusion, great. An entire department doesn't function properly, wonderful. All of these situations breed more consulting work, and besides, if you don't like the mess, why consult?

This question is one that many new consultants haven't pondered at great length. New consultants sometimes walk into a client site, look under the proverbial hood, and are completely unprepared for the ugliness before them. Being surprised is a mistake, and one that consultants cannot afford to make. Clients know when consultants do not approve of the job they are doing. When clients have all of their problems cast in open view, reviewed by a team of strangers, and used as examples of faulty thinking it can be extremely embarrassing for them and hard to swallow. The last thing clients want, at any time during a consulting engagement, is for a consultant to stop dead in his tracks, put his hand over his mouth, and say, "Oh my God. You did that?"

**Are you teachable?**

Perhaps one of the greatest myths perpetrated by consultants is that clients are, on average, stupid. The proof, consultants say, is in the projects. Take one look at the mess that clients create, and most people would agree (or so consultants think). Nothing does more to stunt a consultant's learning than this type of attitude. In fact, it is nearly impossible to consult with any effectiveness if the client is stereotyped, underestimated, or just plain ignored. Clients hold the keys to mountains of useful information, and they either make this information available, or they don't.

The oversight occurs all the time in consulting. Overconfident consultants think that by observing the client for awhile or by reading a brief company history, they will be able to identify and solve every single problem that exists. What they fail to realize is that people on the client team have been working in the company for years, sometimes decades. Their institutional knowledge can be extremely extensive and helpful, and their ability to maneuver through their company's culture can save consultants a lot of heartache. Scoff at your own risk. Clients often know more about their companies than you ever will, so rely on them for occasional help - or drown in your own ignorance.