

## Manage client relations & expectations

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Ultimately, your client or key stakeholder will determine the success of a program and whether you will get follow-on business or funding. So, one of the key responsibilities of a program manager is to manage this relationship. Some useful techniques to set, monitor, manage and reset client expectations and increase the probability of successful project implementation are:

- Identify your stakeholders. Who has a vested interest in your project? Who has resources you need or will ultimately approve your project? Make sure you build a good rapport with these people.
- Establish success criteria. You and your client should agree on what constitutes project completion. If you don't achieve this understanding, you may never finish the project. Criteria are especially important on fixed-price deliverable tasks.
- Get a solid start. Conduct thorough kickoff meetings and carefully document objectives, milestones and client responsibilities.
- Review project status. Maintain a project plan. Review it weekly or biweekly with your team and the client.
- Know your contract/statement of work. Refer back to it before agreeing to additional tasks. You are responsible for controlling the scope of work and changes to it. Ignore the contract at your peril.
- Be careful what you promise. Be willing to say no - nicely, at first, and more strongly when necessary - either when something your client wants is not in the baseline requirements or statement of work or when a request is unreasonable or unethical. Furthermore, you want to say no when it is something that would not be in the client's best interest. In such a case, you can say, "Our experience tells us that...." But when you must say no, try to offer a more attractive alternative that solves the client's problem.
- Actively seek feedback. Be willing to listen to your team members and client regarding what is and isn't going well. You can't fix a problem if you don't know about it. The issue you ignore or refuse to hear about could surface at a later date to torpedo your project.
- Avoid surprises. When you discover potential problems with the project - such as risks and limitations - that may affect the outcome, develop contingency plans.
- Communicate regularly. Recognize the major client relation danger signs such as a lack of regular communication between you and your client, fear of talking to your client about something specific or, even worse, about anything at all, or uncertainty about your client's approval of what you are going to deliver.
- Be proactive. Get your project out of trouble by listening to clients and understanding their concerns. You can bring an executive when you need to demonstrate commitment or when you have bad news to deliver. Finally, be honest: It's easier to remember the truth you told a month ago than the lie you told yesterday.

Sometimes you might have a client who is reluctant to make decisions. These individuals can be very risk adverse especially if they are new to their position or on the project. In this case, you can:

- Help the client understand the requirement and the importance and how it relates to the rest of the project
- Have the information in a simple format to help your client make a decision
- Perhaps the client can be convinced to delegate decision making
- Sometimes the first meeting should just to get acquainted and to summarize the issues brought up and then follow-up meetings should be scheduled to resolve each issue, one at a time

Another situation that can arise is a client who has no respect for you or your staff's schedule or workload. It might help if you:

- Clarify your roles and responsibilities with the client
- Make sure you and your contracts manager don't undermine each other's authority
- Ensure all parties are on same page

Managing client relations and expectations takes effort. But, the dividends are enormous.

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**[www.celerityworks.com](http://www.celerityworks.com) • 206-780-4202 PST • [lisagor@celerityworks.com](mailto:lisagor@celerityworks.com)**

*Michael Lisagor, Celerity Works' founder, has over twenty-five years experience in the successful development and implementation of organizational, business and marketing strategies as well as the management of complex technology development projects. He is the author of The Enlightened Manager and the Business Development Guide for Selling to the Government and a regular columnist for Federal Computer Week.*

*Lisagor believes that a more enlightened management approach will result in consistent organizational growth that will inspire and benefit owners, customers, citizens and employees.*

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