CRAFT OF CONSULTING PODCAST

EPISODE 14: When a Client Doesn't Know What They Want or You Make a Mistake

Hi, this is Deb from Craft of Consulting. This is Episode 14, and today I'm going to do something a little bit different. I am actually going to answer a couple questions that I got from listeners. And there are two topics that they wanted me to address on a podcast and I said, "Yeah, I'm happy to do that."

So the first one was is: What happens if it becomes readily clear that a client doesn't know what they actually want, and particularly if that happens while you're negotiating a contract with them? So I'm going to talk about how to handle that.

The second one is: What do you do if you make a mistake and how do you handle that to try and preserve the relationship with the client?

So these are two things that happen all the time to consultants. So if you're a new consultant or your first couple of years, you've either already experienced it or at some point you will. So I'm going to talk about how to handle those two situations.

So the first is, again, what if a client doesn't know what they want? And in particular, the situation that one listener talked to me about was that that didn't become clear until she started negotiating the scope. And then as she was negotiating the scope. It just kept going round and round and round, constantly changing. A lot of sort of back and forth to try and figure out what actually gets put into writing in the contract? And the problem was is she was having that conversation and not getting paid for it. And she thought, "Well, wait a minute, I seem to be facilitating this process, which is I think adding value to them. Isn't this something that should happen as part of a contract?" And my answer to her was, "Oh, definitely it should." Because one of the main reasons that people come to consultants is to get clarity about things. So if they aren't sure what they're trying to achieve and they aren't sure what those priorities are, that should be part of a contract where you're going to help them do that.

So then the big question is, OK, but you're in the middle of the negotiation. how do you pivot? How do you suddenly transition from negotiating a scope into now saying, “This conversation we are having is now going to be a paid conversation." And that's a tricky one if you've never had to do it before. I definitely understand why it's difficult. I've had to do it a whole lot. So here's what I suggested to her and here's what I would suggest to anybody, is to say it really clearly and really “matter of factly” and as soon as you can. As soon as you see it happening, try and get that transition to happen.

Now if you have a little bit of back and forth, that's perfectly reasonable. That happens. But if you really see that it just keeps bouncing all over the place or you go round and round, as early as possible, trust yourself that that's happening and then try and make that transition. And say it just as matter of factly as you can, which is...this is what I often say is: "So I think in the conversations we've had so far, it's probably become clear to both of us that the first most helpful thing that I can do for you is to get in a room with you or get the right folks in a room,

and figure out what it is that you're trying to achieve, figure out what the priorities are, and then figure out what the right sequence of actions that need to happen in order for you to achieve that. Let's do that first. Let's not worry about how I'm going to actually help you achieve those goals. Let's focus first on nailing that down. It'll be helpful to everybody involved because then everybody can be on the same page. We don't have to worry about it. We'll just get in a room together. We'll figure it out. It'll be great. And I can put together just a quick contract for us to do that. Once we do that, then it'll become clear what ultimately you need me to do for you and we can do a second contract."

So what it does when you have that conversation is it signals to the client that I'm paying attention, I want to add value to you, and I have uncovered the most valuable thing that I think I can do for you right now. It also signals to them that you're now switching to this conversation, moving into a paid engagement, and most of the time, I think every time I've said that a client has thought, "Oh God, that sounds great. Let's do that."

And it's not because they're like, "Oh, they're just trying to get money out of me." It's because that is soothing to them. They no longer have to worry about the frustration they are probably experiencing of saying, "God, why don't I know what I want? Why can't I describe to you what I want?" They know that it's going to be handled. They now know the structure under which it's going to be handled, and they know that you're going to help them do it. And that is often extremely soothing for clients. So it becomes a very productive conversation. But that's usually how I pivot. And it's important to do that. It's important to figure out how to do that. Because as I said, this hasn't happened to me once. This has actually happened multiple times, and I feel OK about it because I love that moment where I realized, "All right. I totally get the first thing that I can help them with."

And what I often find is that even if...And just so you know, I go into the room knowing that this might be the only thing I do for them. Now, sometimes it won't be in a room. Your process might be different. But in my case, I try and get in front of them and facilitate a session where I bring light where there is darkness. But I go into it thinking, "If I do nothing else for them but bring them this clarity that's going to be helpful for them, then that's fantastic. I've added value to them." I don't think of it just as trying to figure out my scope. I think of it as truly trying to help them.

Now what generally happens is there are some times where you're not going to get that second engagement to help them with it, but most of the time you will, because most of the time they're going to be hungry to work with you. Because they've now had an experience of what it's like to work for you and the value that you're able to provide. And they're going to be eager to work with you and it's going to be easier because now you're going to know what goes into the scope.

So that's my advice for how you handle what to do if the client doesn't know what they want and you can't figure out a contract because of that.

So the second one is: What happens if you make a mistake? And I want to say: Don't worry about it. All clients make mistakes. I've made mistakes, and that's plural. That's not singular.

Now hopefully I don't make the same mistakes repeatedly, because the goal is if you make a mistake, you want to reflect on it and you want to learn from it so you don't do it again. But we all do it. And it doesn't necessarily mean that you're going to get fired from that engagement and it doesn't mean that you're going to kill the relationship *if* you handle it skillfully.

Now I am not a lawyer, so it may be that there's some tricky legal issues associated with it and you do have to seek some legal counsel before you address it with the client. So if you need to do that, go do that. But I will say one of the first things that you have to do is you have to apologize. Now I'm sure that seems completely obvious. Like, "Of course, Deb, I have to apologize. Who wouldn't apologize?" Well, you'd be surprised. I've had a lot of clients tell me that it drives them bonkers that somebody hasn't actually said the words, "I'm sorry." And instead, they either try and hide the mistake or bury it in some way or minimize it or just jumped to trying to solve it without actually taking responsibility for it.

And the problem with that is that if your client is having an emotional reaction to the mistake that's happened and they don't hear you say, "I'm sorry," and they don't hear you say, "I apologize," *those actual words*, which is what I encourage people to do, they might be so irritated that they can't actually hear anything that you say afterwards, or it might actually harm the relationship. Because saying "I'm sorry," or "I apologize," builds trust or reestablishes trust, whereas not doing it diminishes trust. And there is one thing if I can encourage you to avoid, is to do what I call an “apology non-apology,” which is essentially instead of saying the words, "I'm sorry," or "I apologize," you say, "I'm sorry you feel that way. I'm sorry that you have these feelings about it." So you're not really taking responsibility. You're actually apologizing for their response to it. That irritates a whole lot of people, and I would not do it to a client. I wouldn't do it to anybody, but I definitely wouldn't do it to a client. Because again, when you make a mistake, your goal is to try and reestablish a good productive relationship as soon as possible. And you want to show respect for that relationship and you want to show respect for your goal of re-establishing trust with them, and the only way to do that, I think, is to take responsibility from the get go. Now that doesn't mean you need to grovel. You don't need to dwell on it. But you do actually have to take that first important step, and then you need to get to the solution, which I'll talk about.

So how do you start the conversation? So I always think it's best done by a phone call or in person. I think speed is really important, so if you're able to do it quickly, do it quickly. You want to show them that you're being responsive. And so you might start the conversation by saying, "I wanted to let you that X happened. I'm very sorry. It was my mistake, and I'm going to do what it takes to solve it."

That's a great way to open because what you're signaling to them is that you are truly sorry, you're taking responsibility, and you're going to focus on a solution. Now, if that solution is obvious, and you know that you can fix it, and there's one way to fix it, you can say to them, "Look, the best solution for this is for me to do X or for my team to do X." If it's not obvious or there are options that they need to consider, then you can say, "Look, there's a few options to solving this. I want to talk to you about what some of those are and then have us pick what makes the most sense," and then you can facilitate a discussion until you arrive at a solution.

Now, if they're too upset to talk about the solutions because they're having a strong emotional response, that's OK. Remember, it's about *them*. They have more of a stake in this than you do. So let them do that. Don't press it. And you can say something like, "I know that this is upsetting. I definitely understand. I'm committed to resolving this. So let me put together some options for you and I'll schedule a time for us to talk." Now if they need to say more, let them say more and listen to it because that should help you figure out what the best solution are and should help you reestablish trust. If there are consequences for the budget...personally, if I truly know that I made a mistake, I'm not charging the client for it. Because again, I think doing so diminishes trust.

Now if you work within a firm and you need to check with someone to see if you're able to do that, you have to have that conversation. But I think that the relationship is more important, and you want to prioritize that. And you don't want them to have any consequences beyond what the mistake was itself. So I usually say something like, "I will, of course, not charge you for any of my expenses related to this mistake." That alone often will take you very far in reestablishing trust with them and getting back on track with the relationship because you're signaling to them that you care, that you're still prioritizing them and their needs, and you're not just trying to get as much money as possible from them. And that's a really helpful way to get on track.

So the other thing I would say is then if you can figure out the solution with them, move quickly. Put it to the top of your priority list. You want to signal to them by everything you did before that you care, you get it, and you're going to solve it, and then you want to signal to them, "It's so important to me that I'm going to do it quickly." If you do those things, most of the time you'll be able to maintain a relationship with clients. Clients know that we're human and we make mistakes. Most of them are very good about it as long as we take some of these skillful steps to try and remedy it and to take responsibility for it. So that's my answer in terms of how I would handle that.

If you're interested in more tips on how to handle different types of client conversations you might have, I actually have a great tool called "Tips and Scripts for Tricky Client Conversations," and it goes over a number of potential things that could happen to you when you're a consultant. In fact, most consultants I know have had all of these things happen. Like:

- What do you do when the client asks for more work and doesn't acknowledge that it actually is an increase in your scope and that that has budget and timeline implications? How do you handle that?
- What if you go over budget or looks like you're going to go over budget? How do you handle that?
- What if you can't do something in the timeframe that a client wants?
- What if a client is not satisfied with your work or your deliverable? So this might not be a mistake you're making, but they're just not happy with what you gave them. How do you handle that?
- And then one of the most important things, my favorite, is when you have to say no to a client, how can you do that?

And so I not only have tips, but as the title suggests, I also have scripts that'll help you get those conversations started and to help them be productive. So if you're looking for those, you can actually go to craftofconsulting.com, go to the "Start Here" page, scroll down to the bottom, and you can actually click on them. I do ask for your email and then I will send them to you so you can download them, and there's a few other tools you can see there.

And if you also have other questions like these two listeners had that you wanted to ask me and have me do a podcast about, I'm happy to do that. So put something in the comment section underneath the podcast or send me something through my contact on my website and tell me what you would like to hear about. I'm happy to see if I can create either a podcast or a video or a blog that can answer some of your burning questions and your burning challenges as a consultant.

So thank you so much for listening to Episode 14 of the Craft of Consulting podcast. I will be back next week with a fantastic interview and I have a whole lot of other ones coming, so please hit "subscribe" so you don't miss anything. And as always, you can go to craftofconsulting.com. A lot of information and tools there that are going to help you be a successful consultant faster. So thanks so much for listening. I will talk with you next time. Bye Bye.