CRAFT OF CONSULTING PODCAST

EPISODE 16: How to Set and Manage Client Expectations as a Consultant

Deb Zahn: I want to welcome you to Episode 16 of the Craft of Consulting Podcast. My guest today is Stefanie Lindeman. She is the owner of SL Grant Development. What she does is, she goes into organizations and she helps them figure out strategies for securing grant dollars to support their work and she's amazing at helping them win those grants. We're going to have more of a back and forth conversation in this podcast where we get into the nitty gritty of an essential consulting skill, which is how to set and manage client expectations from the minute you first start talking to a potential client all the way through the end of the engagement, and then after. There's a lot of great information, and I can't wait for you to hear it. Let's get started.

All right, I want to welcome my guest Stefanie Lindeman to the show today. Stefanie, thank you for joining.

Stefanie Lindeman: Thanks so much for having me, Deb. I'm excited to be here.

Deb Zahn: Oh, great. Well, let's start off and have you tell the listeners what type of consulting you do.

Stefanie Lindeman: I call myself a provider of full service grant development solutions. What that means is, I will not only write your grant, I will help you figure out what should be in your grant, I'll help you plan for it. I have a background in not just grant writing, but program planning as well so I'm also there to help you through that difficult process of planning the program that you want to do and getting the funder to understand that it's what they want to fund.

Deb Zahn: That's right, and that's the difference between hiring a writer who could be a very good writer but can only write the things you tell them to write, versus someone like yourself who can say, "Here's what the program should look like and here's what's going to be compelling to the funder, and I would suggest you add X, Y, and Z because that's going to make this a better program and it's going to make it more likely to be funded." That's what sets excellent grant specialists apart so if anybody's out there and you're doing any grant writing, figure out how to help more than just putting words on a page.

We met many, many years ago when I was actually your consultant. I was a consultant for the organization you worked with and this was before I had boundaries. I actually worked on a number of grants for you folks that you were doing for your membership. I think you remember that way back when.

Stefanie Lindeman: It was a very emotional period for both of us.

Deb Zahn: It was. It was a lot of work, but really great things came out of it so it ended up being a good thing. But, you had a really great idea for us to have a conversation about a really key topic for consultants, and particularly for new consultants, which is setting and managing client expectations, which is not a one and done deal and it involves a whole lot of stuff. I think your idea was great. We're going to walk through that today and we're going to highlight as we go through, and I'm sure we'll have personal stories to tell about some of the common challenges or the things that are particularly tricky about setting and managing expectations, and then our advice and our experience of ways that you can actually handle it. Does that sound good?

Stefanie Lindeman: Sounds great.

Deb Zahn: Perfect. Let's start off with, this should be obvious but in case it's not, let's answer the why question, which is, why is it so important to set and then along the way manage client expectations?

Stefanie Lindeman: This was one of the things I had to really learn when I went from being an in-house person to a consultant because, you know, there is no structure around your work unless you put it there when you're a consultant and there's a couple of things. One is figuring, or is communicating clearly to your client, "Hey, I'm going to do this work for you, but here's what your responsibility is going to be in this to make this happen." I think for some folks when they hire a consultant they have this feeling of, "Well, I'm paying you. I'm going to hand this off to you. It's poof magic, it's going to get done, it's going to be beautiful and then you're going to come back to me with this finished product," and it doesn't work that way.

People hiring you have their own responsibilities and have to participate in the work depending on the project to a greater or lesser degree, but it's never zero. A lot of folks don't understand that, I think, and you're just going to as a consultant end up super frustrated if you don't lay that out at the start.

The other piece of that is the boundary piece that you mentioned, that you'll have the client who wants everything under the sun that may or may not be what you originally anticipated doing for them. You need to be able to go back to something that you laid out with them earlier and say, "Hmm, I know you feel you need this, but this is not what we agreed on, this is not in our scope." Because if you don't do that, you're going to work 24 hours a day, seven days a week. If that's what you want to do, God bless, but for most of us, I would say...I'm going to go out on a limb and say that one of the reasons why people become consultants in the first place is to not do that, to have some balance in their life and have some flexibility, and you won't have that if you don't set boundaries with your clients.

Deb Zahn: That's right, and if you're only relying on telepathic abilities, both yours and your clients, to surface all of the various assumptions that you're going to have in your head and they're going to have in their head, you're going to get into that situation where your boundaries will be pushed on or they'll be frustrated, or you'll be frustrated because you had something totally different in your head, which of course you did. The only way that you figure it out is exactly what you said, which is you have to create the structure and that has to be clear, communicated and agreed upon. Otherwise, nuttiness will ensue and you'll end up in a whole bunch of awkward client conversations because of it.

Stefanie Lindeman: Yeah, I refer to that as the Obi-Wan Kenobi method of managing relationships. I think we all try to do that at some point, either in our professional or personal lives where we're thinking, "Oh yeah, I'm just going to...I know what this person is expecting and they know what I'm expecting of them." You are not a Jedi? I am not a Jedi. No, it's just not going to work like that.

Deb Zahn: That's right. It never does and that's how you get into trouble. So, the big why is to be able to focus on the good work that you're doing and not a whole bunch of drama that gets created because things weren't clear. That's fantastic. We've talked about this a bit before, which is, it's not just managing expectations or setting them when you get the contract, there's a whole bunch of stuff that happens before you get the contracts. From the very first conversation you have with a client about potentially doing some work for them and how you connect that first conversation, what your follow up is, all of that, so let's start there. What are the key expectations before you even get to the contract phase that are important to set with a client?

Stefanie Lindeman: I think a big one is how you communicate with them, because you're going to set the standard in those initial conversations. If they email you at nine o'clock at night and at 9:05 you respond, if you're doing that before you get the contract, they're going to start that after you get the contract. If that's how you work that's fine, but if you don't want to work like that, don't do it in the beginning. I think we get hungry and we think, "Whatever, I'm looking at my computer now I might as well answer."

For me I'll say, OK, if I really feel compelled to do this, I'll write the email, I won't hit send. I'll hit send the next morning at 9:00 or 9:30, which is a time when I feel more comfortable in terms of setting expectations when they can hear from me, and now you haven't gotten yourself into a bad pattern. Whatever pattern you set initially in those early conversations is going to be your relationship, so the communication piece is enormous. For me, I think it's the most important one.

Deb Zahn: Agreed, yeah because you want to show responsiveness, but you also want to respond according to what boundaries you've already established and according to what your brand is. Part of your brand should be that you're responsive, but

then it's got to be within the parameters that are appropriate. And, showing clear communication from the get go is giving them an experience of what it will be like to work with you, which is whether you're conscious of it or not setting an expectation. This is basically saying take stuff out of your subconscious or out of your head, and deliberately make choices about how you're going to actually set it in that beginning stage. What else should you be doing leading up to actually having a contract?

Stefanie Lindeman: I think you want to talk realistically about what you can and can't do for them and help them to understand even at that early part what their role is going to be. Nothing should be news to them. When you get to the contract stage, there should be no surprises for them. In those early communications, you should make really clear what it is that you'll do and what it is that they have to do. For example, for me being a grant writer, I always make sure that I let them know upfront that they're going to be responsible for gathering the information that goes into the grant because I don't live in that office. I don't work in that office, I don't know their program as well as they do. So, they're going to be responsible for that.

If that's not something they feel they can do, I've had a client who has said, "Well, you know what, we don't have the bandwidth for that. Can you just come in and talk to people?" Fine, I'll do that but now I know when I write my contract, that that's going to be part of the expectation. Nobody is surprised when they have to pay for that piece. So, really being super upfront at the beginning, and again it goes back to not letting your hunger for the job make you overstate what you can do, and understate what you're going to expect from them. Everything should be clear from the get go. It's kind of like dating. The more honest you are upfront about who you are and what you can bring to the relationship, the better it's going to go.

Deb Zahn: That's right. They don't need to know about your family yet, but they need to know, this is how I work, this is how to operate, this is how this is going to work best and I'm going to be able to get you the best possible deliverable, and here's how you'll contribute and here's how I'll contribute to that. And again, you're right, sometimes people bring in consultants and it's true with grants where it's like, "Oh my gosh, we have to get this in," but it's true with a lot of other type of work, which often they've got too much to do, they're stressed out, they need somebody to come in and either be an extra hand or solve a problem.

It is common to think, "OK, thank goodness. Now I've given it to the consultants, I can scratch it off my...take it off my worry list," but rarely are there engagements where that's true, where it's truly consultants are off in the wild doing whatever it is they're doing and they're going to come back with something that meets the expectations, because expectations are like an onion. We're going to have a ton of metaphors in this podcast, but expectations are like an onion. You're constantly going to be peeling back layers of it to understand, "Oh, when you said that, you meant this," as opposed to, "I heard

this other thing." Those are going to be ongoing conversations but the more you can have them before you do a contract to kill those surprises because nobody likes surprises that involve dollar signs.

Stefanie Lindeman: No, no, no, no, no, no, and nobody likes…from the consultant perspective, nobody likes surprises that involve you doing way more work than you anticipated. Because, part of what you're doing in these communications and setting boundaries and all this is without actually saying it, helping the client understand that they are not your one and only. That as a consultant, you have obligations to other clients and therefore, they can't expect to get 100% of your time unless that's what you contract for. Unless you pay for this two week period, you have me 100% and here's what that's going to mean in terms of dollars, but it's helping them to understand the place that they have in your life.

Deb Zahn: That's right. What I like about that is, you're setting expectations with all of your clients. If you have another client and you've set expectations that they're going to get this deliverable of this quality at this time, that means you have to think about your whole world, do you have to think about, "OK, then how is how I'm setting expectations with another client going to impact my ability to do that? And, because I've made that promise and I've set those expectations, I need to make choices that make sure that I can actually fulfill what I'm promising to them."

I like that, thinking about it like an ecosystem, and what you do in one area is going to impact what you do in another area, so you've got to clearly make choices about that. I think that's also a great way to think about it because unless you have one client, which most of us don't-

Stefanie Lindeman: We hope.

Deb Zahn: We don't. Occasionally that happens, but unless you have one client for a long period of time, you do need to think about how the choices are going to impact what you've done elsewhere or what you're going to do. That's great. Go ahead, I see you have another thought.

Stefanie Lindeman: Yeah, I just want to say one thing about tone. Because, the things that we're talking about here are a lot of, "Well client, here's the limits on what I'll do. I expect of you," and it shouldn't sound like that. It should sound like...One of my favorite things to say to clients is, "I know this sounds like a lot, but I'm going to make this as easy for you as possible." It's letting them know like, "Hey, I know I'm asking you to do some stuff, but I'm here. I'm your partner in this. You brought me on not to make your life more complicated, but to make it easier."

I think that's really important when you're doing these things because you’re going for, "Client, you and I are in a collaboration here and I am here to help you."

Deb Zahn: Yeah, I like that. That's helpful because the truth of the matter is that if you set expectations early on, one of the reasons you do it is to reduce anxiety at that moment and in the future, because no one has to wonder, and then you can do the pieces that you can do that actually make it easier for them as you go through the process. Those things can be reflected in the contract so that they know and it's in writing that they're going to be well taken care of.

One of the other things that I think that is really important to talk about before you create a proposal or create a contract is also expectations of some of the nitty gritty. So travel, expectation of being on site, duration of meetings. In one of my blogs, it's about managing client expectations, I actually do the math, which is if you say, "We're going to have four meetings," and that's all you're going to write down and you've never had a conversation about it, you might be thinking, "I'm going to do a 90-minute webinar or a 60-minute phone call." They might be thinking, "Oh, we're going to do a half day on site."

That's an extreme example, but that happens all the time and unless you say it, and you talk about it, and you clarify their expectations so that you can reasonably price it out and put it into a contract, then after the contract's signed and they're like, "OK, so when are you going to fly down?" You're like, "What? What do you mean fly down?" Again, that's a bad surprise. If you think talk about it ahead of time, it won't be a bad surprise and you'll know how to write the contract.

Stefanie Lindeman: Yeah, everything should be, you should have the nuts and bolts of everything. When you go to write that scope and like you're saying...The word meeting is such a great example because people have in their heads different, what is a meeting? I will literally put in the scope where the meeting is going to be, how long the meeting is, you know, is it in person? I actually won't call remote meetings for that reason, I will call them something else. I'll call them a phone call, or a teleconference just so there's no confusion about what we're talking about.

I'm pretty detailed about what travel is acceptable and what costs they're going to be responsible for in terms of time, in terms of how I get there. And again, nothing should be a surprise when they get that contract, you should've already had all these conversations. They should look at their contract and say, "Oh yeah, this is exactly what we talked about, because...Can I say a thing about contracts? I want to say a thing.

Deb Zahn: Yeah, absolutely.

Stefanie Lindeman: The thing about contracts and the reason why it's so important in my mind to have everything, have all these conversations and have nothing be new in the contract is unfortunately, people are not always great about reading the contract. They'll still get it, they'll kind of glance over it and they'll sign it, and

then later on when you come back and are like, "But this is in the contract," it's brand new to them.

I find it's always better if I can say, "It's in the contract and also, look at these emails that we exchanged when we were talking about this where we said the same thing that's in the contract," or "We had a phone call about this." I document all my phone calls, which is a little compulsive but-

Deb Zahn: But you are a lawyer.

Stefanie Lindeman: I am a lawyer, so that's part of why I do it. It's reflexive, but it also lets me go back. I don't write pages and pages, but I'll take a little note, on such and such a date we agreed on such and such a thing in this phone call, because it lets me go back and look. And, I'll send an email to them after the phone call, "Hey, that's what we talked about." So, now when they tell you, "Oh, that's in the contract? I didn't see it," you go, "OK. Yeah, I get that, everyone's busy, but there's a conversation that we had."

Deb Zahn: Yeah, and of course the hope is, because even though you're right...You know, if you get into a situation where you're actually correct, you had conversations, it's in the contract, but that's why before the contract is signed to have those clarifying conversations, because that's awkward no matter what. Even if you're right, it's an awkward conversation and nobody feels great about it. I do the same thing where I will put an in-person meeting of X duration, including preparation.

I mean, I go into detail because again, I don't want the surprises, but then I try and make sure that I have a conversation and say, "I'm suggesting these in person. Here's why I think they should be in person, because I also want to focus on value and not just details. Here's the ones that I think makes sense to do remotely and here's why." Then if I get a sense that they're not entirely sure what they want, I might say, "Well, should we put into the contract some sort of as needed hours that if we need to flex things and switch things up later, you have the ability to do that," because I don't want them to think that I have now tattooed a contract onto my back and I'm going to only do what's in there, because clients want an outcome and I want to make sure that I get them an outcome.

But yeah, I think if you think about the path of it is, clarify as much as you can at the beginning, get it into your contract, have clarifying things that you talk about throughout the process, but you're going to have some conversation as you go along. Because even after all of that, why should they remember? They have a million other things that they're attending to.

But before we go into what happens during, let me ask, so deliverables is a big one? Before that contract is signed, clarifying the deliverables, the form, the format, this is also what comes into the what you need from them conversation.

When you've had successful conversations about deliverables or bad ones and you want to avoid those again, what are the key lessons about how to clarify that before a contract gets signed?

Stefanie Lindeman: Again, I focus on the details of it. For example, one of the things that I will do for clients is, I'll do prospect research, I'll look for grant opportunities for them. I have some language that I've done once and don't ever have to do again, that explains exactly what they get from that. What the report looks like, what the information is going to be that's included in that report. I think that's the most... Again, the details are always...Having those detailed conversations are what's important, because you're dealing with language, and words mean different things to different people. So, having them understand what is in that thing that you're going to produce for them is critical so that you don't spend a lot of time putting together a product that they look at and say, "This is not what I wanted."

Deb Zahn: Right, or, "I can't do this."

Stefanie Lindeman: Yeah, you are getting me.

Deb Zahn: With the strategic planning that I do, it used to be back in the day that everybody got a strategic plan and it was a binder, or it was a report and it looked exactly like this. The truth of the matter is, is that people have wised up to how often limited utility that really has in moving an organization or company forward. So, I never assume that there is a way to do a strategic plan and we don't need to talk about it. I have some clients who say, "I don't want a long narrative because we'll never look at it again. What I want is something that looks more like an action plan, and what I want is a PowerPoint version of it. I don't want a word version of it."

I talk to somebody else, and they're just aghast at the notion that you wouldn't have a narrative and you would do this in a PowerPoint. Everyone's different at this point, so I can never assume and I can never price out or figure out what I'm going to do with a deliverable until I say, "What has the most use for you," and then dig into it. So if they say a narrative, well that could be four pages, that could be 15 pages, that could be 20 pages. Let's talk about how detailed you want it to be, and do you want mainly bullet points? Do you want visuals? All of that type of information to make sure that what you're getting them has the greatest utility for them.

Stefanie Lindeman: Absolutely. I think it goes back to what I was saying earlier about a partnership between you and the client, because you're not coming in there...Look, gone are the days when the consultant comes in and says, "Here is what I shall give you." It doesn't work like that. You have to be responsive to what they want and need. Now, they may say, "I want X," and you in your professional opinion because you've done this more than them may say, "OK, I understand you want

X, but maybe that's not going to be as helpful for you based on what I know. What about this?"

They may say, "No, I don't want that. I want this." OK, well they're the one signing the chat, but I think you can always offer your professional expertise, and hopefully that's why they have you there and they'll ask for that. But at the end of the day, you have to arrive at what that product is going to be together, not just, "Here's what I give." And it's not just, "Here's what I want," from the client.

Deb Zahn: That's right. Usually what I'll do in those circumstances, if they want something that I don't is actually going to get them what they want or I've seen it before and it doesn't fit with their culture or something like that, is I'll go to the use of it and I'll say, "So, who's going to see this and what are they going to do with it?" If we have that conversation, which I think is the right conversation to have because it should be based on its usage and utility and not based on you know, "Well gee, this sounds nice," usually if I have those conversations, we can arrive at a place where I feel comfortable.

Not just that I'm going to hand them a project that they're going to give me a thumbs up to, I don't just want a thumbs up, I want it to fundamentally help them, right? If we talk about it ahead of time, and again, this is before my fingers hit the keyboard on a contract, then I feel confident that I'm going to give them something that's really going to do for them what they need it to do.

Stefanie Lindeman: Yeah absolutely, absolutely.

Deb Zahn: One last thing before we go into during. It's so funny because until you think about all the things that need to happen before, you don't realize how much it is. But one of the things that, and this is based on me not doing this, that I know it's so important to do it, which is we know that contracts and scopes and budgets change and need change, and things need to switch up. I believe that good consultants switch up when they need to, and they don't just hug their contract tightly and refuse to budge because that's not about value, that's about you.

What I now am doing, and I mean recently as I've been consulting for a decade is, before we signed the contract saying or even sometimes putting language in the contract that reflects this is that if things change, here's what we're going to do and I mean more than just we're going to do a change order or we're going to do an amendment, but that these are the conversations that we're going to have about the scope and about the budget. Here's how often they're going to be and if we need to make a change, we will reflect on the total scope and together, examine those opportunities to get you what you need, particularly if you need to stay within budget. Anytime I haven't done that, I have come to regret it because again, the first time I have that conversation, I don't want it to be when there's a problem.

Stefanie Lindeman: Yeah, and I literally just wrote that down because I don't do that, so I'm learning something right now. I don't do that. I'm going to ask you a question then about that process. You said, "Here are the conversations we are going to have?" Do you just as a matter of course, build in something into your contract saying every so often, we're going to check in about where we are and make sure we're in alignment with the scope? Is that what you mean?

Deb Zahn: That's what I mean that I'm starting to do now, and to use the actual words, scope and budget, not just...I used to put in check in meetings, and that could mean anything like, how was your vacation? Did you have a good weekend? But, I want to normalize from the get go that we're going to talk about the budget and scope and we're going to talk about progress, and we're going to talk about potential changes as we go along. I want those words to be said before we sign a contract, and I want them to be in the contract.

I have not done that until recently. I care about my clients so we always work something out but yeah, it would've made life easier because again, the first time you have a conversation about scope and budget, you don't want it to be when something needs to be changed or when something's gone awry.

Stefanie Lindeman: Yeah. I'm so glad you said that to me because I actually had, I'll give you an example. I had a situation recently with a client and we have a pretty sprawling contract with multiple scopes but lo and behold, something came up that was not covered. It wasn't a big thing and this maybe leads us into another topic, but it was a thing that I think she felt I should do for nothing.

Deb Zahn: Yeah, that happens.

Stefanie Lindeman: She just said, "Hey, could you just put this together for me real quick?" I'm on the phone with her and the wheels are turning and I'm going, "OK, but that doesn't fall into the scope but I'm not going to do it for free." So I said, "Well ..." The phone call we were on was within the scope and follow up to that phone call was within the scope, just not that kind of follow up so I said, "OK, I'm going to bill this for you under the scope for this phone call and this phone call follow up," and there was dead silence on the other end of the phone.

I think had I had something like what you're talking about in the contract, I would've felt more comfortable saying to her, "Is that not what you were anticipating? Let's talk about whether we might need to amend the scope." As it was, I was afraid to have that conversation. I had no basis in my agreement for it. So I did the work, I billed her for it, I haven't gotten paid yet. We'll stay tuned to how that turns out, but it's so...We're human and these projects take on a life of their own, things come up that you weren't expecting and to have something like you're talking about in the contract is I think so valuable and smart.

Deb Zahn: Yeah, and if you think about it through our empathy lens, most of our clients work in organizations where you get paid a salary, so you don't even...Even though you know you're hiring a consultant who gets, sometimes we get paid by the hour, sometimes it's a fixed price, sometimes it's retainer and other arrangements, but they don't think in terms of hourly because that's not what their day to day life is like. That's not the people who work with them, that's not how they work.

When you're salaried, and we've both been salaried before, you just get it done, you just do what you need to do. It truly is a different language and it's a different day-to-day experience. That's why again, normalizing it from the beginning is you're basically saying, "We're going to speak this language with each other." Then sometimes I asked them, "What's the best way that you'd like to have this conversation? Do you want monthly updates?" Do you want ..." I try and find out from them what would actually make it work for them, because then we're building a language together, we're building a structure together. But yeah, anytime I haven't done it, I've definitely regretted.

In circumstances like that I usually say, "I could put it under this scope if you're comfortable with that," or, "I could see what I think it's going to do with our budget and scope and I could get back to you with some options," which is a way of signaling in case they're not thinking about it that yeah, this has budget and scope implications, which again is not part of their day-to-day world unless they only work with consultants, which most people don't. But yeah, that can be a tricky thing. I've had that happen multiple times and different types of responses which as a consultant, you need to figure out your language for dealing with but there's ways that you can make it easier if you just normalize it from the beginning.

Stefanie Lindeman: I am going to do that in my contracts from now on forever.

Deb Zahn: This is a good podcast no matter what. Let's switch to during. Now you've got a contract, deliverables are clear, the details are clear and now you're in the contract. And again, there's no reason to assume that they're going to remember everything that's in the contract, because they're not walking around on the planet only thinking about your contract. They're trying to get a bunch of stuff done. Now what do you do during it, to continually set and manage expectations?

Stefanie Lindeman: Well, if I've done a good job in terms of putting the scope together and the contract together, then it tends to be a lot easier because I have something to point to so if things start to get unruly I'm able to say, "That's not there. That's not what we agreed on." But not everything, not every little thing is covered in the contract and managing the relationship itself is not something that you can necessarily document well in the contract. If you have a nonresponsive client for example, even if you've put into the contract something about how they have

an obligation to be responsive, there's not a whole heck of a lot you can do contract-wise about that.

It becomes about managing personalities and learning, you have to manage everybody a little bit different. Everybody is their own person. It's much like being a manager in an organization, or working in an organization you have to manage down, up, sideways. It's like that, except it's different because you don't have the same kind of leverage as a consultant, that you do when you're within an organization. You don't have all the ways that you have...I can't walk into somebody's office and say, "Hey, I've sent you 20 emails, answer me," because their office may be in New Jersey and-

Deb Zahn: Right, or they'll call security.

Stefanie Lindeman: Yeah, or they'll call security. You just can't because it's not cool, or you just can't show up. That for me has been the trickiest part and the thing that I had to learn because I felt like...I've been working in this field for a long time, not as a consultant but internally. I've worked with a lot of different personalities, I'm great at managing up, but you have to learn...One of the things you talked about, an empathy lens before. I think that's really important.

I have a client who we signed the contract and I sent an email. I was like, "OK, here's how we're going to start," and blah, blah, blah, it was this big, long email and in retrospect, I realized I probably panicked, but I got no response. Part of it was, let's schedule our kickoff phone call, here's all the dates we could do it, and let's do this and let's do that. I finally got it through my thick head that like, you're freaking this woman out.

Finally after sending a bunch of emails like that, sent her a much more compassionate email where I said, "Hey, I know you've got a lot on your plate. If this date doesn't work for you right now, that's fine. Let me know what might work." Or, "Let me know if you want me to just check in with you later and we'll start then." Oh my God, I got a response within 10 minutes. So, this is what you have to do. You have to understand the person, read the response or the non-response, and read between the lines. In a lot of ways, we have to be like social workers and understand what's going to work best with the other person, because they've got a lot on their plate.

A lot of times you're working with an executive director or a head of operations, or a completely overwhelmed mid-level manager. I can say from having been completely overwhelmed mid-level level manager working with consultants, it was always better when someone was coming to me and saying like, "How can I make this easier for you?" Not, "Here's my schedule."

Deb Zahn: Come on, let's do this.

Stefanie Lindeman: I should've realized that because...As you said at the beginning, we met because you were a consultant for an organization that I was working at and you and I worked on a lot of projects together. One of the reasons we worked really well together, I think, was because you were tuned into how many things I had on my plate. I didn't see your phone number pop up on my caller ID and hit straight to voicemail because I didn't want to talk to you.

Deb Zahn: Oh my God, she's back.

Stefanie Lindeman: I knew that when I picked up the phone, I could say to you, "Hey, I've got a zillion things. How can we figure out how to get this done that's not going to break my back?" I finally figured out how to incorporate my own experience on the other side of things into how I work with clients. You have to know who's in the client I've got to call a million times before they answer, who's the client that if I call a million times I won't hear from them? You have to be really in tune to the other humans.

Deb Zahn: Yeah, because everybody's different and everybody's got a different set of circumstances. I've worked a lot with folks who what we're doing together if you looked on their job description, it could only be included in other duties as required because their world and their responsibilities keeps getting bigger and bigger and my job, and your job, and our job as consultants is to make it as easy as possible for them to get where they want to go.

That doesn't mean we can go off and do things by ourselves, but that's part of the when you're setting expectations is, I'm going to make it easy. I'm going to need some things from you, but also tell me if you can't. Tell me if you need to say, "Look, just for the next week my head's down and I'm dealing with something. Get back to me." From our perspective, well that makes our life a little more uncertain, but, them's the breaks. That's part of what being a consultant is.

Stefanie Lindeman: I will put a caveat to that, in that you have to make sure that you let the person know what the implications are. If they're saying, "I've got this other thing that I'm focused on and I can't deal with this for a week," you can say, "OK, got it but that's going to mean X for our deadline," and maybe you have to come up with another way that puts less burden on that person but still keeps you moving. But, you want to make sure they know so that it doesn't come back later to bite you that, "Hey, you told me this was fine and now we're up against it."

Deb Zahn: And now it's not fine. Don't just soothe me in the moment, tell me the truth. The other thing is, if they need to put something off for a week or two, sometimes I'll say, "Just so you know, I'm heading into another project. Come back to me when you can, we'll talk, we'll figure it out and we'll figure out a way, but it might change the timeline a bit because I'm going to be a little less free in two weeks." And again, that's the peeling of the onion of expectations

which is, I get it, I'm there, I'm here to support you and my time is not 100% free. I'm going to do the best I can for you, but I just want to make sure you know this so again, no surprises, no surprises, no surprises. This podcast should probably be called no surprises.

Stefanie Lindeman: No surprises. Speaking again as someone who has been the client, consultants who I felt most comfortable working with were the people who were upfront with me about what their capabilities were. I didn't want to work with somebody who was going to promise me the moon and the stars and then not be able to deliver it, that's worse. For me that's worse than someone saying, "OK Stefanie, I get it. You need to take a pause, but that might make this late, it might make me less available," because then we can problem solve together. I'm all about the collaborative relationship with the client, like let's problem solve together. Do you have someone else in your organization who can help move this along?

Deb Zahn: Yeah, exactly. Do you want to bump me to someone else? I'm happy to go wherever you want me to.

Stefanie Lindeman: Yeah, whatever you want to be.

Deb Zahn: Right, and often I see a lot of particularly new consultants do a little too much people pleasing, without thinking of the long-term implications of that. You might soothe someone in the moment, but really you're just delaying anxiety if you're not setting expectations and telling them the truth, because then you're just going to have a frustrating conversation later, and you get a feel good for a few days that's not helpful. That's not helpful to anybody.

I want to touch a little bit on...So basically during the contract, you have to then do all of the things that you talked about before. Switch up, have conversations about scope and budget, but I also, I think it's important to set expectations after the engagement as well in terms of if they want more, if they want to add some things on to it and your availability. If they don't want anything right now, but you want to set the expectation that you care about them and you're going to be looking out for them and if you see anything, you'll bring it to them not from an icky upsell perspective, but from a, you're now in my brain as someone that I care about, or an organization I care about and I'm going to look for opportunities for you, or something like that. How do you think about after an engagement, how you want to continue with the expectations?

Stefanie Lindeman: After we're done, I usually, there's a couple of things that I like to communicate. One of them is, I like to tell them what a great job they did.

Deb Zahn: Yep, yep, because who does that? Probably they don't hear that enough.

Stefanie Lindeman: Right, and sure they're paying me, but they're not paying me to say they did a great job. I like to acknowledge the fact that they put in a lot of work on this,

and this is their work as much as it is mine. The other thing that I like to do is feed back to them some things that I've learned about them and how they work, and how I might be able to help them based on this. Sometimes that, "Hey, I see based on what we just did, you guys are in a real growth position. I have these opportunities that come by me all the time that might be able to take you even farther. I'm going to share those with you because I think you guys are in a good place and I want to see you grow." Or sometimes it's, "Hey, you were really honest with me about how you were struggling with this one particular thing. This is something that I can help you with. Maybe after you get through X, Y, Z, let's talk again because maybe I can help solve that problem."

Deb Zahn: Or even which is often shocking sometimes to clients is to say, "I don't do that but you know, I know somebody who could help you with that."

Stefanie Lindeman: I've done that to, I've done that. I've said, "Hey, you said X, Y, Z. That's not in my wheelhouse, but I know somebody great. Do you want me to connect you?" They appreciate that, and it means when they have something that is in your wheelhouse, they're more likely to come back to you. You're being honest, always be honest in a nice way. Say what you mean, mean what you say, but don't say it mean.

Deb Zahn: I like that. That's a t-shirt waiting to happen. To show the care and the empathy, and that you're driving towards the outcome that they told you that they wanted, and that happens throughout the whole cycle. I'm going to end actually...We've covered a lot. If I was a brand-new consultant, I would be listening to this again and taking notes. But, let me end with this because I know that you have a life outside of the work that you do and balance is important. You said at the beginning, you were talking about the importance of setting boundaries to enable a full life. What are a couple of the tips that you would suggest to new consultants that you do to help maintain a balance?

Stefanie Lindeman: First thing you have to do is determine what balance means to you. Balance is different for everyone. Figure out what it is that you want to have the time to do outside of your work life. Figure out how you work best. Some people work best with a lot of structure, some people work best and they'll say, "I want to work, even though I'm a consultant, I want to work between the hours of nine to five, Monday to Friday because that's what works for me, and I want my weekends open." Other people like me will say, "Hmm, the weather is going to be really good on Friday and really bad on Sunday, so my weekend is going to be Friday and Saturday and I'm going to work on Sunday.

So, understand yourself. The first part, I mean, this all sounds very crunchy granola but to be a good consultant and obtain that balance in your life that you're looking for, you have to know yourself really well, so figure that stuff out first. Then that means when you're talking to clients and you're setting boundaries, you always have in your head, every...I do volunteer work. Every Thursday afternoon, I have a volunteer obligation, so I know I'm not going to

schedule a meeting on Thursday afternoon. It's not going to happen. It's going to have to be some extraordinary circumstance for me to say, "I can't show up at that obligation."

It's all about figuring out what your hard stops are, what are your things that you need to put in the calendar, and I use that. I put all my personal stuff in my calendar, even if it's just like, I know I go to yoga class every Monday and Thursday morning. I don't really need to put it in a calendar to remember that, but it's in my calendar so that I know when I'm scheduling, I schedule around that. Your life is important.

Deb Zahn: Enough to schedule if you think about it. I have a blog on setting boundaries and I distinguish two types of boundaries. One is sacred, which is no matter what, that's it. I never miss my husband's birthday. He's born on Halloween. It's a big deal, it's a big deal to him, which means it's a big deal to me and I never miss it and that's it. Then I have firm boundaries, which should only be occasional, which means I should have a hard time remembering the last time I violated that boundary. To me it's I don't work on Fridays.

I just worked yesterday when we were taping this. I worked yesterday which was a Friday, but that means I took part of Thursday off to accommodate it. But the next time I do that, I shouldn't easily be able to remember when I did. That's my sacred and that's my firm boundaries, but I've decided what they are ahead of time and not that I need to decide them in the moment that a client's talking to me, because you will forget your boundaries if you haven't really clarified them. That's great, I love that.

Stefanie Lindeman: Absolutely. That's particularly true when you're new. I keep talking about being hungry but that's because, number one I haven't had breakfast yet. But number two, when you're new, you feel like you need to sacrifice everything to get the work. So, knowing in advance what, and I love the terms you use, the sacred boundary and the firm boundaries, knowing what that is for yourself is going to make a big difference.

Deb Zahn: That's great, that's wonderful. Well, I want to thank you so much for being on this podcast and actually, we'll just be honest, this is the second time we've done this because the first time it just taped me, it didn't tape you and so I got a little fancier with my equipment. But, this has been fantastic and I think this is going to be helpful actually not just to new consultants, but to anybody who's doing consulting that wants to keep honing their ability to set and to manage boundaries and expectations, because we're always going to have to do it, always.

Stefanie Lindeman: Yeah, you need a refresher once in a while.

Deb Zahn: Absolutely. Well, thank you so much for being on.

Stefanie Lindeman: Thanks Deb. I had a great time. This was a great conversation.

Deb Zahn: Thank you. Well, thank you for listening to Episode 16 of the Craft of Consulting Podcast. I have a lot of other really great folks that are going to come on and talk to you about what they know about consulting and how to be successful, so please subscribe so you don't miss anything and check out Craftofconsulting.com. That's my website where you can find a whole lot of information that's going to help you in your consulting business and also making sure that your consulting business works with your life. Thanks for listening, I will talk to you next time. Thanks.