# The Consultant and the Client Relationship

**By Rebecca Winston**

Franklin P. Jones, a Philadelphia reporter who wrote for several publications including the "Saturday Evening Post" once wrote, "Honest criticism is hard to take, particularly from a relative, a friend, an acquaintance, or a stranger." I thought about the quote when I was rummaging around in my brain for what I might write about, as I knew I should draft something for the Journal. But what to write, then I stumble across the quote on the Internet. My mind ran to criticisms from clients, former employers, and team members.

In a perfect world or at least my perfect world, I would not be faced with any of these criticisms and all my clients, employers, and team members would have pleasant personalities, enjoy my personality, agree with my opinions, and approve of my way of conducting projects and programs. They would appreciate the efforts I put forth in managing the aspects I am assigned of the projects and programs. However, the world is not perfect and some clients, employers, and team members disagree, are difficult, or are unpleasant. Further, some projects and programs seem to force clients, employers, and team members into personality styles that are not easy to accept, manage, or tolerate. In fact, I have found myself working on some teams or observing some teams where decisions have been made that compromise ethics or at least give the appearance of compromising ethics in an effort to avoid complaining, criticism, and bad feelings.

Even though a client, employer, or team member may be difficult or challenging, the project or program manager or team member has an obligation to deliver the objectives of the project or program to the best of his or her abilities. One should not compromise to lessen the complaints. While it fun to sit and laugh at a comic strip where the lead character asks the employer what it will take for him to go away and leave him alone, it is not funny in the real world of projects.

So what can one do? Well, for the consultant here are a few lessons learned.

1. **One should be selective when accepting clients.**

   Using discretion when selecting or accepting a client and their work, it a must. Learn about the client and the work. The Internet is an invaluable resource these days to learn about the client and in many cases the type of project or program you are going to be asked to undertake. Speak to other consultants, especially if you have concerns, to find out if the client has a history of discharging contractors for unreasonable demands, expectations, or concerns.

2. **Explain your operating procedures.**

   While the contract may contain some of these items, one should make sure that your office hours are understood including what times you are willing to accept phone calls and conference calls and whether these include weekends. One should make it clear whether or not the client will need to have an appointment for a conference call or whether you would be willing to accept a call if you have time.

Inform them as to whether a call to your private residence is acceptable or not. You must enforce this policy strictly or it will not be applicable when you want it to apply.

Establish a definition for what is an emergency and what is not an emergency.

You may want to establish a set time for a call and ask them to keep a log of questions for that set time. It means not accepting calls unless they meet the definition of an emergency at any other time.

3. **Use an Engagement Letter to define the Scope Assigned**

   Just as with the project or program, the scope of work you are undertaking needs to be well defined. This definition should help to lessen the possibility of misunderstandings and claims of misrepresentations. The Letter of Scope can be made part of the contract by reference by mentioning it in the contract. It is a further delineation of the scope contained in the contract. One should outline the areas not included in the scope you are undertaking to avoid the client engaging in scope creep.

4. **Use a Written Fee Agreement**

   If the fee agreement is part of the contract, it will help avoid disputes in the future, which can easily destroy the working relationship. For large project or for programs, it is recommended to break fees into work units for smaller deliverables or for life cycle phases. This type agreement will require definition to be provided for what the deliverable or life cycle phase is to be to avoid disputes over whether the item or phase has been accomplished.

5. **Set parameters for acceptable behavior**

   Parameters may be times for phone calls, frequency of phone calls, visits to the office, frequency of visits to the office, number of reports demanded, types of reports to be requested, or trips to be made and duration of the same. These items should be documented and agreed to by the parties.

6. **Communicate on a regular basis**

   Send the client copies of reports, communications that go to the other team members, and communications that go to other stakeholders. Clients may become suspicious or disagreeable, if they feel they are not receiving sufficient communication or are not receiving the same communication as others who are paying your fee on the project or program. The feedback will serve to assure them that they made the right decision to hire you and that the project or program is proceeding in the proper direction and on schedule.

7. **Withdraw as a last resort.**

   If the client is unmanageable, the relationship is damaged, you are unable to represent the client for the project or program, you as the project or program manager or team member should request to be release from the contract. Note, the contract should provide for such an action upon written notice and the appropriate documentation turnover and specifications. The action may also require one to turn over the material to an employee of the client with a face-to-face meeting.

   Assure the client that you will safeguard their information, confidences, and any business proprietary information.

While the withdrawal is regrettable, a relationship that has come to the point where it is not productive, the client is being unreasonable, or you cannot satisfy the client should be viewed as having reached a point where it has naturally terminated; therefore, it needs to be closed. One should reflect and document the lessons learned for future client interactions.

Criticism is hard to take, but one should always listen. Criticism may be telling us that we need to document more, listen more, communicate more, or remove ourselves from the situation. But no matter what it is, criticism is a way for us to improve our situation and ourselves.

## About the Author

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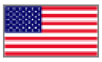

**Rebecca (Becky) Winston**, Esq., JD, PMI Fellow, is a former Chair of the board of the Project Management Institute (PMI®). An experienced expert on the subject of project management (PM) in the fields of research & development (R&D), energy, environmental restoration and national security, she is well known throughout the United States and globally as a leader in the PM professional world. Becky has over 30 years of experience in program and project management, primarily on programs funded by the US government.  She is a graduate of the University of Nebraska's College of Law, Juris Doctorate (1980), in Lincoln, Nebraska and has a Bachelor's of Science (BS) degree in Education from Nebraska Wesleyan University She is a licensed attorney in the states of Iowa and Nebraska, USA.

Active in PMI since 1993, Rebecca Winston helped pioneer PMI's Specific Interest Groups (SIGs) in the nineties, including the Project Earth and Government SIGs, and was a founder and first co-chair of the Women in Project Management SIG. She served two terms on the PMI board of directors as director at large, Secretary Treasurer, Vice Chair (for two years), and Chair (2002). She was elected a PMI Fellow in 2005.  She has served as a reviewer of the Barrie Student paper for the PMI Educational Foundation for several years.  She is also a member of the American Bar Association and the Association of Female Executives in the United States.

Ms. Winston periodically serves as an advisor to organizations such as the National Nuclear Security Administration (USA), U.S. Department of Energy (DOE) and the U.S. Department of Homeland Security (DHS) on topics ranging from Program and Project Management to project reviews, risk management and vulnerability assessments. She has also been serving on the Air Force Studies Board for five years for the National Academies of Science, Engineering, and Medicine.

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