



Communication Tips for Building and Maintaining Client Relationships

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BM6155 Client relationships are the very foundations on which great businesses are built and maintained. While major corporations like Hewlett-Packard Company and Lockheed Martin have famous brands and hundreds of account managers who specialize in dealing with clients, the small business has to take a much more direct approach. Whether you are an owner of a sole proprietorship, a head of a growing firm, or a project manager working in a small company, communicating with your client is the most important skill you can develop. Join us in a discussion to bring out the common, everyday difficulties that your peers face. Learn how to build solid relationships and create open communication with your clients. Also, learn how to repair client relationships that may have gone awry. Whatever your title, role, or goal, this discussion will help you relate to your clients and open the communication necessary to transform clients into advocates.

Learning Objectives

At the end of this class, you will be able to:

- Learn how to form and maintain lasting relationships with prospective and current clients
- Learn how to identify and improve areas of communication with clients
- Understand how to approach and identify issues with dissatisfied clients
- Learn how to change “problem” clients into advocates of your firm

About the Speaker

Curt Moreno is the owner and editor of Kung Fu Drafter, a blog that is CAD-centric and geek peripheral. He is an active freelance content creator for clients such as the Autodesk, HP and others. He is also a contributing editor to Cadalyst magazine as well as the AutoCAD Content Manager for AUGIworld Magazine and a highly rated Autodesk University speaker. Curt currently lives in Houston where he is the CAD Coordinator for a Texas-based engineering firm, is a public speaker and trainer, and enjoys spending time with his dog and horses. Visit his blog at www.kungfudrafter.com, follow him on Twitter at @WKFD, or search for him on Google+.

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Introduction

This course is intended for the freelancer, the sole proprietor and employed CAD or design professional, who works with clients in any context. Incorporating the following information, professionals in both large and small organizations will benefit by building and maintaining client relationships. It is information that will help anyone communicate, build relationships and weather difficult situations involving clients.

Whether you are a professional working with external clients paying for your services or with coworkers as internal clients; the goal of this session is to help every design professional learn to build sustainable relationships.

Business is About Clients

“A business that makes nothing but money is a poor business.” ~ Henry Ford

Perhaps you are a sole proprietor or the head of a multi-national corporation. More likely you are somewhere in between the two of these. You own, manage or otherwise work for a small to medium-sized company that makes stuff. It doesn't matter if that “stuff” is designs for roads or buildings or whatever it may be. When you think of what your business does the thought in your mind probably goes something like this:

“I work for X and we make / build / design Y.”

And you would be wrong.

If you are in business, as an owner or an employee, then what you make is not “Y”. Whatever “Y” may be is up to your particular case. No, if you are in business then what you make, what you depend on are relationships with your clients. That means that business, the verb and the noun, is all about clients!

Clients bring us work. Clients pay our bills. Clients are, or at least should be, our most faithful champions in their market, telling others how great we are! If your clients are not your champions, then they probably are not bringing you much work and you are probably having problems paying your bills. The good news is that there is a one-stop method to fix this and turn that situation around: It is time to build and maintain lasting relationships with your clients.

Who is the Client?

“So, if clients are so important why do more businesses not just realize this and treat clients better?” ~ Any Person

It might seem like an obvious statement that the client is all important. From that position, it may also seem obvious that building a relationship with the client is also important. So why doesn't everyone just do this? I believe that the problem is not that companies or employees do not “know” that the client is important. Obviously no one gets up in the morning and plans to go to work thinking “Wow, today I am going to make life terrible for all of my clients. Won't that be a

great strategy for success?!” No, the problem is that too many of us have lost track of who the client is.

A client is more than person who comes to your office clamoring away about a project and waving a check at you. (If only that was the case!) They are also more than a face in a sea of complaints who wants yet another conference call or update. Both of these views are overly simplistic and just flat out wrong.

A “client” is anyone we interact with. Please note, I said “interact with,” not “do business with.” The idea of “doing business” with someone invokes the idea that money will exchange hands. A typical notion of a “client” may be “someone I do something for and they pay me.” Again, that is overly simplistic.

A “client” is anyone who receives a service from you or your business. So if you an architect, a person who comes to you to design a building is a client. That is pretty obvious. Less obvious is that the architect in the office next to you is also a client. So is the accounting manager and the sub-contractor who sent you a request for information (RFI). They are all clients because they receive information, cooperation and general communication from you. In these cases, they are service clients and they pay you with similar services of their own, making you their client as well.

The Goal of Having a Relationship with Your Client

Let’s pretend that I asked an architect or engineer the following question: “Do you think it is beneficial to build and maintain a good relationship with your coworker?” Almost certainly any person would answer that it was in fact beneficial to build a good relationship. What about a neighbor? Or a relative? Or a worthy charity? The average person would see the merit of having good, long-lasting relationships with all of these. The reasons would vary from “I have to work with them” to “they do good work in the community.” Whatever the reason, a good relationship is a plus. So how can anyone not see the merit of building a long-lasting relationship with a client?

Who Does it Right?

The issue is that we think we have already that relationship, and in many cases this is true. There are plenty of companies that know their clients, get return business from their clients and for whom their clients are their biggest advocates. The companies are easy to identify because they are very successful. Let’s look at a couple of very large corporations that are successfully working this strategy.

Apple

Apple Inc., formerly Apple Computer Inc., is one of the largest and wealthiest corporations in the world. Producing consumer hardware and software, Apple has amassed a legion of faithful clients. There is no doubt that Apple sees the merit in knowing the likes and dislikes of their clientele, in aggregate, when you look at the number of computers and smartphones that it sells each year. You don’t post quarterly

revenues in excess of \$35 billion by not paying attention to the client and building a relationship through your products and services.

The Apple client is a technologically or, in some cases, a fashion / trend-minded person who appreciates Apple's products and recognizes their value. In fact, they recognize the elusive quality that Apple possesses so much that they are advocates for the brand and actively evangelize the merits of their computer or smartphone to non-Apple clients.

Google

Very much like Apple, Google Inc. is one of the world's largest and wealthiest technology companies. Starting with a single interest in providing search results, Google's management was very keen to learn all it could about its clients from day one. To that end, Google began amassing likes and dislikes and using algorithms to predict user actions. Quickly growing, Google has used its growing awareness of its client to spread out far beyond search.

Today, Google is a technology giant and has interests in everything from self-driving cars to smartphone technologies to things as abstract as "prolonging the human life." All of these, and many more, are outreaches of Google's efforts that it believes coincide not only with the beliefs and values of its management, but also with those of its clients.

Given that Google recently posted quarterly earnings of over \$14 billion, it seems that its clients agree with its use of the information it has and how it has used it.

But I'm Not Google or Apple

Thank goodness for that! The world already has a "Google" and an "Apple". So we are good on that front. For now, at least. Still, just because you are not a huge, multi-national corporation does not mean that you shouldn't work to have strong relationships with your clients. This is not a game that can only be played by those willing to pay billions for the price of admission. In fact, it is a game that can often be played even better at a smaller scale!

Communicating with Your Client

As any well-paid therapist will tell you, the key to a good relationship is communication. It is true in marriage, it is true in trust-falls and it is true in business. So ask yourself, are you communicating with your client? Before you say "well yes, of course" let's delve a little deeper.

Delivering is Not Enough

Whether you are a business owner or an employee, doing your job is just not enough. Perhaps there was a time when it was, but that time is gone. Today's markets, all markets, are hyper-competitive environments where there is intense competition for every available dollar. In order to retain a client and build that relationship you have to do more than "deliver."

This is just as true for the project manager or owner who actually deals directly with the "client" as it is for the person working hard to produce a plan set. In either case, people expect a return on their investment. A paying client will expect to feel that he has gotten a good value and that

you have been cooperative, attentive and innovative in your exchanges and design. Similarly, a coworker will want to feel that his efforts and time investment in you also pays a dividend. He, or she, also wants a sense that you are pleasant to work with, cooperative and, in general, a plus for the team.

To insure that the client sees a benefit in doing business with your firm or yourself, pay close attention. You do not have to collect reams of data like Google, but noticing things like an affinity for green spaces can help an architect devise a plan that speaks more to the client than say a concrete terrace might. Learning about a client's situation can help a civil engineer inform his client that a slightly larger invest in a water plant could save money in the near future, given his population trends. Or just remembering that your office-mate likes fresh coffee and bringing them a cup when you get one can endear you to them. Otherwise, in all cases, the client is wasting their time.

Queues of Cues

Observance is a trait that will serve any person in business well because it helps you to pick up on the cues given off by people. Fortunately there are no shortage of cues given off by a client. Taking note of a client's cues will help you tailor your design, product or service to better suit the client's particular tastes.

For instance, in the previous section we discussed that an architect may use his client's affinity for green spaces to improve a design. If, when discussing the design, the architect notes a lack of commitment from the client he could take this cue to mean that the greenscape is close, but not exactly what they want. This is especially helpful since it is very often the case that a client does not know what they want. It is rare, however that they do not know what it is they don't want!

Taking the cue from the client and adjusting the conversation and design could yield more commitment and buy-in from the client. More importantly, the client will feel that you have given them exactly what they wanted, without their having to tell you. This is the magic that exists between Apple and its clients and this is what makes a client today a repeat client tomorrow!

Learn to Listen

Giving the client what they want is most easily achieved by listening to them. Whether you are working to develop an entire land development or breakfast for the family, you have to listen to the client in order to fulfill their expectations. However, listening is not a skill that all people possess. That does not mean that it is a difficult skill to learn.

Listening is one more form of interaction and one that can be achieved with several easy steps:

- Posture – Maintaining an open posture is important to make your client, and yourself, accessible. Crossed arms and downward looks will quickly silence the communication stream

- Listen, Don't Talk – When your client is speaking, be quiet. Chances are, that even in the most seemingly unimportant comment can be a clue as to what a client is after and would like you to deliver
- Empathize – Everyone likes to feel that they are understood. Take a moment to see things from the client's point of view. This is especially helpful and will provide the most insight when you are not in complete agreement
- Repeat – Repeating what you have learned or been told in your communication with the client is the surest way to guarantee that you fully understand what the client has said or wants

Following those 5 easy steps will put you on the road to learning more from your clients than ever before. And that is the key to creating a relationship where you deliver more than expected, but exactly what is desired.

Problem Solving as Communication

“If I had an hour to solve a problem, I'd spend 55 minutes thinking about the problem and five minutes thinking about solutions.” ~ Albert Einstein

While “problem” may be hyperbolic term, the fact is that every client situation is a situation with a challenge that requires attention. When a client comes to you to engage your services, they are seeking your assistance with a problem. In this situation, as a business, it is in your best interest use your communication skills towards solving that problem.

Identify the Real Problem

When putting on your problem-solving hat, it may seem that your client has readily identified the issue troubling them. Still, the problem at hand may not be the actual issue that requires attention. It is not that the client is hiding the true issue from you, they may not even have become fully aware of it themselves. So it is incumbent upon you to help them determine what the best solution to their challenge is.

Listening, taking note and asking questions are all tools used to determine if the goal that the client has set out with is, in fact, the proper one for them. In the event that you consider all the information and decide that the client may be mistaken, you must let them know. Discuss your observations and what conclusion you have come to. Explain your position and be open to any and all commentary. Always be on the lookout for the communication cues that could lead you to other possible solutions.

When Delivering is Your Job

Eventually delivering the product is part of every project. When the time comes it is important to remember that this is no time to close the communication channels. In fact, maintaining communication with the client will help accelerate the design process and assure that accuracy of the process.

Regular communication throughout the design process serves several purposes, all of which are beneficial.

- Project details – Regularly conferring with clients on client details will help insure that the project does not go off the rails. It only takes one instance of miscommunication and poor planning for the design of a project to go off on a tangent and waste valuable time. Ringing the client in can avoid these and other complications
- Updates from the field – Making contact with clients while you are visiting site projects or sub-contractors can make a client feel catered to. All it takes is a quick phone call or sending a quick email note to let them know recent findings
- Let clients access project documentation – Every project can generate a mountain of documentation throughout the development process. Various document management systems make it is easy to give clients team-access to documentation so they can have the benefit of full access to all aspects of the design

Following this short list of communication tips will raise the value of your stock in the eyes of your clients. Further, it will lay the foundation of a long-lasting relationship with your client as you show them how helpful and accessible your firm can be. These are two very important traits if your client is to feel satisfied and that they have gotten a good value.

The Dissatisfied Client

Of course, not everyone is going to feel satisfied all of the time. When doing business, there will always be the odd client who requires not only more attention, but a certain sort of attention. In the most general of terms we often refer to this type of client as “dissatisfied” or “difficult,” the former being more accurate than the latter.

Even though situations with dissatisfied clients can often become personal, and even emotional, the term “dissatisfied” is still more accurate. The reason is simple: it describes the client’s state of mind. They have engaged a service, presumably paid for the service and now feel that the service was not a good value for their investment. Whereas “difficult” just implies that they client is somehow gaining satisfaction by being intentionally hard to deal with. While “difficult” clients do exist, they are the overwhelming minority.

Good News and Bad News

“Into each life some rain must fall ...” ~ Henry W. Longfellow

When it comes to dealing with dissatisfied clients there is some good news and some bad news. The bad news is that you must deal with a dissatisfied customer, and you must do it immediately. This is not a matter that can be allowed to fester. The good news is that this process can be much easier than you may imagine.

The Stages of Mitigation

Just as there are several stages of grief that can be identified and categorized for purposes of generalization, there are several stages of mitigation. In the case of mitigating a client's dissatisfaction you can take the following 5 steps as a reference guide.

- Listen to Them – Approach the matter with an open mind and listen to the client's comments. Collect all the facts, as seen by the client, and understand them thoroughly before moving forward
- Don't Make it Personal – It is far too easy to take personal any situation where someone does not seem to appreciate your efforts, but this is not an option. Always remember, you are a businessperson and this is just business, set emotion aside and resolve it
- The Problem Within – Naturally the client feels that the problem is with your company and service. Whether your initial response is that the problem is or is not your fault, it is important to investigate your internal processes for fault.
- The Solution – Sometimes the path to mitigation is as simple as asking the client the straightforward question "What will satisfy you?" Sometimes it takes a bit more investigation. Whatever the process, once you have determined the solution you must determine whether you can deliver that. If so, then commit to the solution and mitigate the matter as soon as possible.
- The Problem is Outside – If you decide that, for whatever reason, that you cannot deliver a solution that will satisfy the client then it is time to end this relationship. Ending a client relationship should always be the very last option and done in as civil a manner as possible.

From Agitation to Advocate

The goal of any and every business should be to create a clientele list that is comprised completely of advocates. This may seem like an easy feat to achieve with a client who is delighted with your services. It may also seem that a dissatisfied client is the least likely candidate for advocacy that you can imagine. The truth is that you may find that your dissatisfied customers have the greatest potential for advocacy. The idea that a dissatisfied client could become an advocate for your business may seem counterintuitive, but it is true.

The possibility of transforming a dissatisfied client into an advocate can be much easier to accept once you realize that advocacy is about passion. This is because it takes a certain level of passion to motivate a person to promote and evangelize the services. To do this without compensation, but rather out of a sense of investment and desire to include others. This type of passion is what drives the multi-billion dollar revenues of corporations like Apple and Google.

When it comes to passion it is hard to find someone more qualified than a person who is vocally dissatisfied. They are perfect candidates for the type of person who has the passion for advocacy. They have already engaged your services and they feel something regarding the results and have decided to express their opinion to the point that you are aware of them.

Should you not resolve the matter you can be sure they will spread that opinion to many others. That is precisely the type of passion required for an advocate.

By acknowledging that there is a problem and then taking the necessary steps you can quickly mitigate the issue. The quicker that resolution can be reached and the greater the degree that you can satisfy this client, the greater chance you have to transform them into an advocate. The reason is that you will have taken this vocal, actively opinionated client and redirected that energy and passion in a new direction through the filter of satisfaction.

The chances of this newly satisfied client going into the world and becoming an advocate for your firm is far greater than a client who was happy from the beginning and invested nothing more than money. That limited investment is too little for the average client to actively evangelize your services to others in their market.

Given all these factors it is easy to see how a dissatisfied client is a rare opportunity to create an advocate and ally that can help promote your services far and wide among their colleagues.

Conclusion

As you can see, communication with a client is far more important than the mere concept of “communication” might imply. Where the term might imply that emails, calls and the occasional pre-printed Christmas card is enough, it should be clear now that it is not.

To build successful, sustainable relationships with your clients you must invest more than mere “communication.” You must treat every client with respect and match their time and monetary investments with sincere and utmost investments of effort and attention. These are tried and true methods to creating satisfied clients. However, even when your client is dissatisfied, that is no reason to abandon communication or relationship building.

We now see that the “dissatisfied” client is an opportunity to go beyond communication and relationship building. The dissatisfied client is the prime opportunity to transform a client into an advocate. It is the advocates that are created by your services that will be more than just “satisfied” and even repeat clients. It is these clients who will become your best clients, your best advocates and the best relationships your business can have.