



CHAPTER FOUR

Managing initial client meetings

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Initial client meetings are the starting point from which you begin building a client base in your organization. In most cases you will have been invited by a potential or existing client to discuss a problem and explore the possibility of providing some assistance. Your ability to handle and manage initial client meetings professionally is vital to your success. Initial meetings are the first step in promoting your involvement and expertise to clients. Having the capability to enter a potential client's office and subsequently emerge having sold your services is a demanding and challenging role.

It may well be the case that at an initial meeting you already know your potential client. However, be wary of making assumptions about how to deal with your clients. It is very easy to think that someone you have worked with for many years is simply an old colleague. You may feel that you can simply turn up for the meeting and have a good old chat with them. This is not the approach to take. You need to view former colleagues with a very different 'client' perspective.

Initial meetings have to be conducted with a high degree of professionalism. Simply arriving at someone's office with the intention of having a friendly discussion is not the way to impress clients. Throughout the meeting you want to send strong messages to your potential client that you value and appreciate their time. You have to show that you are keen to assist the client in any problems or challenges they may be facing.

The objectives of initial client meetings are to:

- Learn about your client's operation.
- Understand your client's problems or challenges.
- Determine whether you might be able to help them.
- Assess if you can provide assistance in the necessary timescales.
- Assess if you are interested in the problem.
- Begin building a client relationship.
- Reflect on the client's problem.
- Agree the next steps or withdraw from any further involvement.

The essential rules for managing initial client meetings

The most important rule in any initial meeting is to get your client talking. Getting through an initial meeting in a thorough and professional manner requires you to follow a set of clear guidelines. If you adhere to them you will find that your initial meetings run successfully. So ensure that you:

- Always arrive on time – never be late even if your client is (remember that is their privilege).
- Introduce your colleagues (if two consultants are interviewing).
- Carry out clear and focused introductions – who you are, where you are from, the nature of your skills.
- Outline your understanding of the broad purpose and objectives of the meeting.
- Check the amount of time your client has available for the meeting.



Helpful tips

- A powerful question to ask your client at all initial meetings is 'What would success look like if this project were to be successful and work?'
 - This question can also be followed by, 'And what would people be doing differently as a result of the proposed initiative – what would they be doing that they are not doing now?'
 - In most instances these questions will secure powerful responses from your client. They will define in their own terms exactly what they want the project or your involvement to deliver. You will be surprised how quickly you obtain your clients fundamental requirements.
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- Obtain your client's agreement to the meeting's objectives and timescales – this forms the basis of a contract for your meeting. You want to find out as much as you can about the client's situation.
 - Discuss and clarify your understanding of the background and issues by asking lots of open-ended questions.
 - Summarise and reflect back your client's comments regularly to ensure you have understood what has been said.
 - Ask for access to any supporting or relevant materials concerning the problem – reports, documents that might be supplied during or after your meeting.

- Check for any areas that your client does not want you to get involved in. Establish the boundaries to your work.
- Agree on the results your client would like to achieve
- Be prepared to explore tentative ways to possibly solve your client's problem. Remember that it is very early to start being prescriptive about solutions.
- Summarise and agree the next steps concerning your involvement – key actions and responsibilities before your next meeting. In most cases this will mean you presenting an initial terms of reference for discussion.
- Agree a date, time and place for your next meeting.
- Agree a basis of maintaining regular contact and access to your client. For example:
 - Weekly 30 minute meeting to review progress.
 - One page summary of key actions to be sent to your client every week.
 - Monthly review meeting with your client and the project team.
- Agree a form of communication with your client to announce your involvement on the project. Agree a distribution list of interested parties. Offer to draft this letter for your client to review and then circulate.



Helpful tips

Watch out for the disappearing client syndrome!

- At an initial meeting you must discuss and agree with your client the communications and reporting arrangements for the proposed project. Often on projects consultants fall victim to the client who is promoted, becomes too busy or simply loses interest in a project. In effect they disappear! So you must establish a basis for regular client access.
 - If you have, at your initial meeting, agreed precise reporting arrangements and subsequently confirmed these in your written proposal, you can refer to them if your client starts to miss review meetings. Regular client access allows you to up-date them on progress and problem areas. It also means you can do this sooner rather than later. You must always keep focused on your main client and not allow them to drift away from a project.
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- Keep a record of your meeting.
 - Write to your client confirming what was discussed and any agreed action points. Also confirm the date, time and place of your next meeting.

Things to avoid at initial meetings

Appearing unprepared or unprofessional is probably the worst impression to give any client at an initial meeting. Below is a list containing some classic errors. Avoid them at all costs.

- Not stating your objectives for the meeting.
- Not listening to the client.
- Talking too much at your client.
- Displaying arrogant or aggressive behaviour.
- Being inflexible in your interview approach.
- Running out of time to deal with all the issues.
- Being drawn into making personal comments about other people or departments in your organization.
- Voicing recommendations too early – remember it may not be a systems or people issue!
- Demonstrating a lack of confidence or credibility.
- Leaving the meeting with the wrong problem.
- Not being proactive enough in suggesting how events should progress to the next stage.

How to convey respect, openness and understanding at an initial client meeting

Respect

- Arrive on time.
- Be polite and courteous.
- Acknowledge your client's opinions and respect their values.
- Agree a contract for your meeting – objectives, timing etc.
- Allow your client time to talk about their concerns.
- Give your client full attention.
- Avoid patronising comments or observations.
- Avoid being judgemental – just listen.

Openness

- Be clear and open about your objectives.
- At this early stage avoid matters that may involve organizational politics or intrigue.
- Be prepared to admit on your part any errors, mistakes or misunderstandings.
- Share some of your thoughts and ideas with the client.
- Be honest about explaining the scope and limitations of your work.
- Be honest in your answers – if you don't know then say you don't know.
- Challenge your client if you do not understand anything. It is better to ask now rather than later. Asking later may make you look foolish.

Understanding

- Demonstrate a real appreciation of your client's position by informed questioning.
- Regularly summarise your client's answers and their comments.
- Recognise that some clients may have strong feelings on certain issues.

Initial client meetings consultant's template

As part of a professional approach always attend an initial meeting with your questions prepared well in advance. This will in itself help you to project confidence and a sense of experience. At the end of an initial meeting you need to carefully record the results of your client discussions. Consider using the template at the end of this chapter to act as a focus for your questions and to record key points. The following pages provide some simple examples to illustrate how they might be used. (See over).

INITIAL MEETING FORM**Date/Time** March 7, 14:00**Location** Head Office, Chicago**Dept/Client Name/Present** VP Finance, Jan Peters, Mark Thomas

Meeting Purpose To discuss the merger of two finance departments in the New York area following the recent acquisition of a major competitor business.

What is the client reporting structure

- Jim Davies (CFO)
- Carlos Mendes (VP Finance)
- Jenny Bond (Manager) Erica Hoffman (Manager)

Description of client's operation

Finance functions currently process all key financial reporting activities for both businesses.

What are your clients issues

Requirement to merge two key functions following an acquisition. Each have different cultures and work processes.

Need to rationalise the staffing levels and successfully integrate new activities and workload whilst minimising any operational disruptions or delays.

Large operations – different business systems, styles and culture along with need to effect rapid integration – 4-6 months.

Initial thoughts to solve problem

Establish project team to highlight key issues.

Develop an integration strategy.

Meet staff and understand perspectives and key concerns.

Communicate intentions and set out draft timetable.

Develop resourcing and staff release schemes in line with HR department support.

Action

- Visit sites – JP, MT
- Interview key staff – MT
- Prepare integration strategy – MT and key client staff

Next meeting date/time/place

March 25, 10:00,
Head Office Chicago

Duration of meeting 2 hours

INITIAL MEETING FORM**Date/Time** 12 Sept, 8am**Location** Zurich Office**Dept/Name/Present** IT Dept – Gert Hunzinker, David Thirill, Rolf Behr**Meeting Purpose** To discuss the migration of a major customer database from an existing stand alone system to new fully integrated state of the art network.**What is the client reporting structure**

- Rolf Wigand (IT Director)
- Patricia Jovenetti (Supervisor)
- Anne Dabell James Lock Jan Laube

Description of client's operation

Speciality chemical business serving small medium sized business across Europe.

Department is link to sales, marketing and accounts

What are your clients issues

Need to effect clear migration plan

Minimise disruption

Develop plan to make the switch over critical holiday period in order to lessen impact on business and customer operations

No real experience today of handling a project of this complexity

Staff reactions

Initial thoughts to solve problem

Review existing status of project with key vendors – establish exact position

Establish transition team and develop draft plan – Involvement of key stakeholders

Meet with key stakeholders on operational impact and issues

Address customer and staffing communications

Action

- Get budget – GP
- Detailed requirements meeting – DH DT
- Visit other key business sites with RW – RB

Next meeting date/time/place

18 Sept, 8am, Zurich Office

Duration of meeting 1.5 hours

Initial terms of reference

Why prepare an initial terms of reference?

The most visible and professional way in which you demonstrate to your client that you have understood their problem and requirements is by producing a terms of reference. This document serves as the 'contract' between you and your client. It will in all probability, be referenced and updated on complex projects several times during the life of an assignment. In some extreme cases, the main project objectives may even change. Clearly such changes must be documented so that the focus for the project is not lost. It is essential that any changes made to your terms of reference are discussed in detail and agreed by your client before they are implemented. No consultant has the power to change an initial terms of reference without the express agreement of their client. Only when the client has signed off any changes to the terms of reference can a project really begin.

What should the initial terms of reference contain?

The main characteristic of a quality terms of reference is that it should be clear and concise. It needs to clearly indicate what the project's objectives are and what work the consultant is proposing to do. It also needs to highlight any constraints or assumptions that you are making and also show the key stages and milestones involved in your plan. It has also to indicate your resourcing and where appropriate costs.

The key headings to use and a description of their content include the following:

BACKGROUND

- A description of the background to the work or the project.
- Identify any past problems or other relevant issues.
- Include information gained from your initial client meeting.
- Keep this section to a maximum of two paragraphs – it should provide someone new to the project with a clear and simple overview.

OBJECTIVES

- State the outcomes and business objectives that must be achieved from the work.
- State who your client is.

BOUNDARY

Document the boundaries or scope of the work to be covered. Clearly identify:

- What will be done.
- What will not be done.
- What departments will be involved.

CONSTRAINTS

Record the constraints that you are working with including:

- Time.
- People.
- Money.
- Equipment.
- Other resources.

ASSUMPTIONS

- State the assumptions you are making. For example, access to resources, client staff and financial budgets. This will indicate to your client what further information you will need.

When your initial terms of reference are signed off, there should be no assumptions left in it, as you will have either agreed or adjusted the basis on which you will carry out the work following your client discussions. For example your client has now agreed that managers will be instructed to release staff to attend your interviews. In the real world you cannot assume that this would have happened. Many projects have failed because too many assumptions were made that proved to be just that, an assumption! So if in doubt raise it as an assumption, clarify it and then remove it.

CLIENT REPORTING

State the client reporting requirements showing:

- Who on the client side will receive your reports.
- How these reports will be presented – meetings, electronic mail or paper.
- What precise format the report will take – Microsoft Word, Powerpoint etc, A4 text document or landscape Powerpoint slides?
- When the reports will be delivered.

PROJECT DELIVERABLES

State the project deliverables indicating:

- What the deliverables will be.
- When they will be delivered.
- Note these down as milestones.

ACTIVITY TIME CHART

- Show the major tasks involved in your project and their sequence.
- Indicate when they will be done? Show the week number and completion dates.
- How long they will take.
- Who will be completing these tasks.
- Show the milestones where key deliverables will be made, e.g. presentation, report, system specification, operating procedures, client workshops.

FINANCE (WHERE APPROPRIATE)

- Show the staff fee rate for each project stage.
- Show other necessary resourcing and material costs.
- Show the total estimated budget required.

Sample initial terms of reference

Our initial terms of reference headings have been transferred onto a form that you can use for your project. Figure 10 highlights the key elements of the TOR.

BACKGROUND Description of background of work to be done. Two paragraphs maximum.

OBJECTIVE State overall business objectives. State project sponsor.

BOUNDARY What work will be done. What work will not be done. What departments will be involved.

CONSTRAINTS Note constraints in terms of time, people, equipment and money.

ASSUMPTIONS Your customers will provide you with further information. When TOR signed off, there should be no assumptions in it.

REPORTING What are reporting requirements? Who receives them? How will they be represented? When will reports be delivered? Meetings, electronic or paper.

DELIVERABLES What are you going to deliver? When are you going to deliver?

FINANCE How much will this project cost? Include cost of people, equipment and expenses.

✓ BACKGROUND
✓ OBJECTIVE
✓ BOUNDARY
✓ CONSTRAINTS
✓ ASSUMPTIONS
✓ REPORTING
✓ DELIVERABLES
✓ FINANCE

Client sign-off

FIGURE 10: PROJECT TERMS OF REFERENCE

This form can be found in the chapter on ‘The Internal Consultant’s Toolkit’. Review the following example and reflect on how you might incorporate this approach in your consulting work.

Remember, at this stage you are preparing an initial terms of reference based on your understanding of the project. These details will invariably change and more information will be added as the project progresses and develops.

TERMS OF REFERENCE FORM

Client Name Boris Lang IT Director

Date 16 August

Consultant Name Emily Goodson

Location Hamburg

Project Name Internal Support Department

Start Date 18 September

Background

- In the last two years, the Hamburg office has increased its staff from 30 to over 120. IT support for training and computer maintenance is currently supplied by two external companies. Service levels vary considerably.
- Head office have an international drive to create internal IT support sections wherever possible throughout the company to provide greater control and quality of service to our employees.

Objective

- To investigate the service level provided by the two external companies
- To document the skills required for an IT Support function.

Boundary

- Involve the senior management at Hamburg site
- Understand and document the services required
- Interview staff of external support companies
- Interview staff at Hamburg site
- Determine level of satisfaction of employees
- Do not recommend individual employees for new post

TERMS OF REFERENCE FORM

Constraints

- Details of this assignment must not be discussed with the external IT support companies

Assumptions

- Members of external IT support companies are available for interview
- Internal staff members are available for interview
- All interviewees will be available over a one week period

Reporting

- Provide a brief progress report every Friday by 14:00
- Use the internal electronic mail system

Deliverables and Milestones

- Provide a final report at the end of the assignment in 4 weeks time
- Present the findings to the IT Director

TERMS OF REFERENCE FORM

Activity Time Chart For Project:

Activity	Who	Effort	Start	Week 1	2	3	4	5	6	7	8
1. Prepare Plan	EG BL	0.5 0.5		***							
2. Services Needed	EG	3				****					
3. Investigate Co 1	EG	2				****					
4. Investigate Co 2	EG	2				****					
5. Interview Staff	EG	4						*****			
6. Report	EG	2						****			
7. Presentation	EG BL	0.5 0.5									
Total Effort:	x days										

Estimated Costs

Resource Name: Emily Goodson **Rate:** 900 **Effort:** 14 **Cost:** 12,600

Resource Name: Boris Lang **Rate:** 1,500 **Effort:** 1 **Cost:** 1,500

Resource Name: **Rate:** **Effort:** **Cost:**

Resource Name: **Rate:** **Effort:** **Cost:**

Equipment Name: **Cost:**

Equipment Name: **Cost:**

Expenses: **Cost:** 1,000

Total Estimated Costs: 15,000

Approved by Client: _____

Date: _____

Writing client proposals

For some projects, where you find yourself in a competitive situation you may have to bid for the work you propose to carry out. In such circumstances you will have to present a formal written document to your potential client. So you will need to expand your initial terms of reference into a full proposal. To do this, you have to include all the sections covered in the terms of reference and add some additional information to enhance your final proposal.

Structure any proposal in a clear and logical manner. Where there are several clients involved in the final decision-making process try to identify and reflect their various needs in your proposal.



Helpful tip

Keep the time spent on drafting a client proposal in line with the size of the assignment on offer. Don't spend one week writing a proposal for a project that is likely to last a few days. You need to use your time effectively and focus your energies on proposals that offer best promise.

Submit your proposal to your client as a typed and narrative document. It must not be presented as a completed form. Use the same headings as in your initial terms of reference but expand each section to provide more detailed information.

For example:

- Enhance the boundary section by explaining the type of research or information gathering you will undertake. Who you will want to interview and how much time you will need to complete the work.
- Enhance the activity time chart by providing a description for each activity – indicating not only your responsibilities but also your client's.
- Specify the time and costs involved and the use of other internal/external consultants.
- Remember when planning activities to take into account factors such as holidays and the availability of clients and their staff. Agree any absences in advance with your client so as to avoid problems at a later stage.
- Finally, remember to check all your key facts and numbers.

Additional headings you should include in your proposal concern your:

Consulting Experience

This section outlines your professional expertise and competence to carry out the assignment. Include your previous experience in addressing similar projects or problems and also include your curriculum vitae. If you have a team that will be used for the project, include the details of your team's skills and experience.

Methodology

This section deals with your approach to tackling the project by describing in detail your approach or methodology. If you are involved in information technology or training consultancy you might describe your process for conducting your development cycle (linear or iterative) or training needs analysis.



Helpful tip

In very complex and multi-disciplinary projects you may have to consider to what extent you can accept responsibility for the quality of work of third party contractors or consultants who may become involved in the project.

You have to be conscious of your possible exposure and liability in the event that a third party fails to complete their work on time. In such instances your proposal should specify your conditions for managing and accepting the involvement of other parties over whom you have no real control but whose work will impact on your project outcome. Failure to deal with this type of issue can have disastrous consequences at a later date.

Remember the whole basis of effective client management is to avoid possible problems by predicting them in advance and taking corrective action to ensure they do not arise. The golden rule is to never surprise your client.

Managing initial meetings checklist



The first stage in the internal consulting process involves establishing a working relationship with your client. The primary objective is to clearly identify your client's needs and begin exploring how you might provide assistance. It involves submitting a terms of reference and agreeing in detail a project's objectives, time-scales and costs.

Questions you should ask:

- What does the client consider to be the problem?
- Do they appear to fully understand the problem and issues surrounding it?
- Has your client appeared to identify the right or wrong problem?
- Does your client want to take full ownership for the problem?
- Is your client aware of their limitations in trying to solve the problem?
- Does your client see you as a partner in tackling the problem?
- Are there other important parties or clients who may need to be brought into the project to ensure a successful outcome?
- Do they have the backing of their boss to start the project or do they have to sell it upwards?
- Is your client fully aware of their commitments and responsibilities in commissioning the project?
- What is the real problem facing your client?

Client's perspective of you:

- Are you competent and knowledgeable?
- Do you appear and behave in a professional manner?
- Can I work with you and trust you?
- Do you make me think in different ways about the problem?
- Do you have the right expertise and track record?
- Are your initial thoughts and plans practical and realistic?
- Is your terms of reference or proposal reasonable?

Other client thoughts:

- Do you report to other senior people within the organization?
- Do you listen well?
- Are you aloof or arrogant?
- Do you value my time?
- Do I like you as a person?

Other statements/questions you might use:

- What are your main business concerns at the moment?
- What are the real issues or problems as you see them?
- What will happen if the situation continues?
- What have other people said about the situation?
- What do your colleagues think about the situation?
- Why have you asked us to provide some assistance?

- What role do you see us playing in helping you address the problem?
- If we were successful with this project what would success look like?
- Could we have access to the relevant data and reports?
- Have you considered these other options...?
- Are there any parts of the organization or areas you do not want us to get involved in?
- Have you thought about any other ways that you might address the issue?
- These are our initial thoughts about tackling the work.

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