Tips and Scripts For Tricky Client Conversations

CRAFT of CONSULTING®

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Introduction

Tricky client conversations are common in consulting. You can do a lot to avoid having to have those conversations, but some are just unavoidable. Knowing how to start and navigate those conversations means they are far more likely to end well.

In this guide, I give tips and scripts on how to handle the following common examples of tricky client conversations:

- When a client asks you to do more work and doesn't acknowledge that the increase in scope has budget and/or timeline implications
- When you go over budget or it looks like you are going to
- When you can't do something in the timeframe a client wants
- When you make a mistake
- When a client is not satisfied with your work or deliverable

Need more information?
See the Craft of Consulting blog "How to Master Tricky Client Conversations" at www.craftofconsulting.com.

When a client asks you to do more work and doesn't acknowledge that the increase in scope has budget and/or timeline implications

Tips: In many cases, it can be a good thing when a client asks you to do more work. It gives you a chance to help your client more! But creating clarity about the implications is critical any time the scope increases. Do not assume anything, including that your client knows they asked you to do new work or that it might cost them more. Do not assume they know it may impact the timeline or your ability to deliver on other work. Your client may ask you to add to your scope more than once during a client engagement. It is important to address it with the client each time it happens. Trust me! This will help you avoid having to have a difficult conversation about going over budget later and keep you from doing work that you won't get paid for! It is an essential stress avoidance strategy—for you and for your client.

In responding to this situation, the goals are to:

- Let the client know that you want to help them if you can
- Clarify with the client that what they are asking for is beyond the scope in your current contract
- Clarify the details of what they are asking you to do
- Create some time for you to figure out what the implications and options are

Sometimes, the client wants you to tell them on the spot how much more it will cost or what it will do to the timeline. Avoid doing that because you need time to figure out the details so you can give them accurate information.

Script:

"I'd be happy to help with that if I can. Tell me more about what you would like done."

- Just like when you clarify any scope of work, make sure to ask what the specific work is, what the final deliverable is, what the timeframe for completing the work is, etc.

"Great. Let me take a look at what this would do to our current budget and timeline and I'll get back to you by [give them a specific day that is within a few days and that gives you time to give them accurate information]."

Alternatives:

If your client has expressed any concerns about staying on budget or sticking to the timeline, you can add:

"I know the budget/timeline is very important to you, so I'll also see if there are any options to tweak what we are already doing to accommodate this new work in the budget and timeline we have."

When you go over budget or it looks like you are going to

Tips: The most important thing is to track your budget often so that you can anticipate budget issues. Sometimes fast-moving and/or complex projects make that difficult. So, if you are going to go over budget, tell the client—in writing—as soon as possible and before you are going to go over budget.

If you have gone over the budget and did not inform them prior to reaching or exceeding the budget, apologize when you talk to them. Do this first and use the words "I am sorry" or "I apologize." Owning it and directly apologizing can help temper their emotional response.

In responding to this situation, the goals are to:

- Let the client know quickly and before the budget is exhausted
- Have written documentation that the client has been informed
- Let the client know that you care about their budget
- Provide the client with as much clarity as possible about why it happened, how much you expect it will go over, and when that is expected to happen
- Provide the client with options for getting the budget back on track

Script:

Email:

"I reviewed our most recent budget numbers and need to let you know that we will likely reach our budget cap [or exceed our budget] on [add as specific of time as possible]. I will schedule a time for us to talk through the details and discuss options."

- Then immediately schedule a call to review the details and develop a plan with them.

Alternatives:

If you have already gone over budget, you can send an email:

"I reviewed our most recent budget numbers and need to let you know that to date [or as of X date], we have exceeded the budget cap [or contract budget] by $X. I will schedule a call immediately to discuss it. We will stop all work immediately until this is resolved."

- If the project has hard and fast-approaching deadlines, you will have to make a judgment call if you want to proceed with the work and risk not being paid. It may be worth it to maintain the relationship with the client or it may not be a risk you want to take. If you want to proceed, you could add this to the email: **"Please confirm that you would like us to keep working on the project."** You may also add something to let them know that meeting the deadline is important to you.

Note: Before you send the email, you should get advice from legal counsel to understand any potential legal implications of how and when you notify them or what your contract obligates you or the client to do when the budget has been exceeded.

When you can't do something in the timeframe a client wants

Tips: When a client asks you to do something, be realistic about what you can do and in what timeframe. It is better to say no than to commit to something that you can't deliver or can't deliver with high quality when they want it.

In responding to this situation, the goals are to:

- Let the client know that you care about what they need and when they need it
- Identify, the best that you can, if the timeframe is truly set or if it can change and, if it can be changed, negotiate a different timeline
- Maintain a good long-term relationship by always delivering on your promises

Script:

"I would love to help you, but I am currently booked. I only want to say yes if I am certain I can do what you need well and in your timeframe. Is the timeframe set or could it be moved?"

If they say it is set, then the best thing to do is say:

"I am afraid I have to say no. I wish I could help, but I won't be able to do it in that timeframe. I have more availability starting in about [give a time when you will be more available] if there's anything else you need."

- If you know someone else in your firm or another consultant that could help them, refer them to someone. It shows the client that you care about what they need and helps maintain a good relationship. Clients are often surprised and delighted that you are willing to give someone else work because you want to help them!

If they say the timeframe could be changed, you can say,

"Again, I'd love to help you with this. Would it work if I started on this project [give a time when you will be more available]?

When you make a mistake

Tips: Communication is key when you make a mistake. When you realize the mistake, alert the client. Quickly gather whatever information you can first and then reach out to them. Talking to them in person or by phone is best—although they make ask for a follow-up email to document the situation.

Note: If there are some tricky legal issues, make sure to talk with your legal counsel before you talk to the client.

When you talk to the client, the first thing you should always do is apologize. Use the words "I am sorry" or "I apologize." You can give reasons but do not make excuses or minimize what happened. The goal is to focus on the client and their needs, not yours. Owning it and directly apologizing can help temper their emotional response.

You don't, however, need to grovel or dwell on it. Get to the solution. That will matter most to most clients. If it has been solved already or the solution is obvious, let them know what you have done or will do to solve it and assure them that everything is or will be back on track. If the solution is not obvious or there are choices they need to make, present them with options and work with them until you are clear on how best to proceed.

If the mistake has consequences for your budget, eat the direct costs of the mistake. That is one of the best ways to show the client that you care and will do what it takes to make it right. If it impacts other aspects of the project, be honest with the client and do whatever you can to get the project as close to back on track as possible.

In responding to this situation, the goals are to:

- Let the client know as quickly as possible that you made the mistake
- Apologize for the mistake and take ownership of the consequences
- Focus on solutions and on getting back to value for your client
- Reestablish trust

Script:

Start the conversation:

"I wanted to let you know that X happened. I am very sorry. It was my mistake, and I will do what it takes to solve it."

If there is an obvious solution:

"The best solution to solve it is X." [Then tell them what you have done or will do and what the outcome will be.]

If there is not an obvious solution, but you have options to consider:

"There are a few options to solving it that I want to talk to you about."

- Then facilitate a discussion with them to arrive at the solution.
- If they are too upset to talk about solutions, don't press it. You can say, "I know this is upsetting. I am committed to resolving the mistake so let me put together some options for you, and I'll schedule another time for us to talk."

If the mistake has consequences for your budget:

"I will, of course, not charge you for my expenses related to this mistake."

When a client is not satisfied with your work or deliverable

Tips: As with most situations, communication is key. If they tell you they are not satisfied with what you have given them, first show them that you care about their response. This one, however, can be particularly tricky because you have to identify what actually happened. Don't assume that they are wrong or right. It is usually more complicated than that. Ask yourself these questions to try to get to the heart of what happened and what you should do:

- Did you give them the wrong deliverable?
- Is your deliverable not high enough quality? Should you have done better?
- Did you not clarify what they wanted enough?
- Does what you gave them match what is specified in the contract or is it different?
- If it is what is specified in the contract or what you discussed with the client, does the
- client not recall what they asked for or did they change their mind?
- Is it unclear what happened?
- Is what they want the best thing for their situation?

The answers to these and other questions will guide your response. If you made a mistake, apologize and do not make excuses or minimize what happened. As always, the goal is to focus on the client and their needs, not yours. Owning it and directly apologizing can help temper their emotional response.

Note: If there are some legal issues related to what is in your contract, make sure to talk with your legal counsel before you talk to the client.

In responding to this situation, the goals are to:

- Let the client know that you care about what they want
- Focus on creating clarity and a path forward
- Balance not losing money on something that you are not responsible for with maintaining a long-term relationship with the client

Script:

If you did not give them the right deliverable or it wasn't high enough quality:

"I apologize that I missed the mark. Let's talk about what you would like changed and how I can get you what you want."

- Then facilitate a discussion with them to clarify what the deliverable should be and to decide what you will get them and by when.
- If it was your mistake and there are consequences for your budget: "I will, of course, not charge you for my expenses related to this mistake."

If what they want doesn't match the deliverable in the contract or what you had agreed on with them:

"It sounds like what you want is X. I am happy to talk about getting you that. It is different than what's in our contract [or what we had agreed to previously]. But let's talk about it, and I'm sure we can figure how to get to the right place."

- Then facilitate a discussion with them to clarify what they want and what it would take from a budget and timing perspective to get it to them.

If after you discuss it, it is clear that what they want is a completely new deliverable or something very different than what you are obligated to give them, be honest with them.

"I understand now what you want, and, again, am happy to get you that. However, it is different than our current scope [or what we agreed to] so I would need to check our budget and timeline to see what impact this new work would have. Would you like me to do that?"

- If they agree, great! Make sure you do a contract amendment or change order to add the new scope, budget, and timeline into your contract.
- If they push back, then you have a choice to make. Do you want to eat the costs to maintain the relationship or do you want to continue to negotiate with them so that you do not use money? Or do you want to split the difference?

- I usually only will not charge them for all or some of the costs if I could have prevented the situation by communicating with them more clearly or more often. Otherwise, I push the negotiations because I don't want to set a bad precedent with them or myself.

If I am going to keep negotiating, I signal that at the start of the negotiation and then give them options:

"I want to you get what is best for you, and I am happy to talk about how to do that. However, it will mean we have to add to the work I am doing for you, or we can take a look at everything we are doing and see if we can make some changes to accommodate this."

If I am going to not charge them for all or some of the costs:

"OK. I want to you get you what is best for you, and I will do more to make sure I am clear about what you want going forward. I will not charge you for X, and I am going to set up some additional check-ins so we stay on the same page."