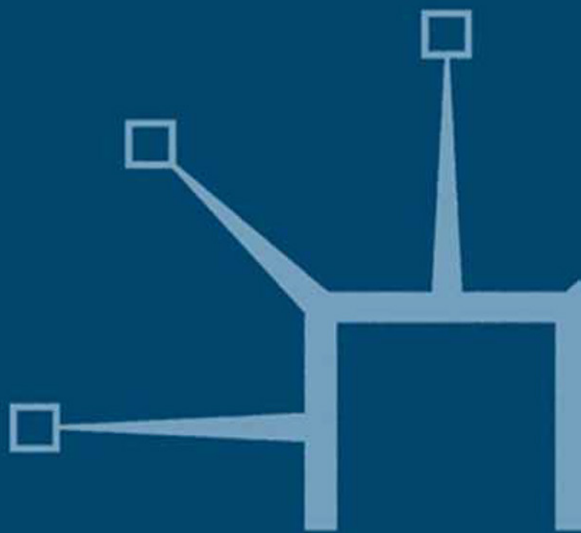


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**MANAGING
CHALLENGING
CLIENTS**

BUILDING EFFECTIVE
RELATIONSHIPS WITH
DIFFICULT CUSTOMERS

Aryanne Oade



Managing Challenging Clients

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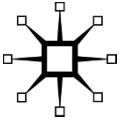
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Aryanne Oade

Director, Oade Associates Limited

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About the Author

Aryanne Oade has worked as a Chartered Psychologist since 1991. She has appeared on C4 speaking about customer complaints handling; has given an address on ‘Creativity in Business’ at the British Association for the Advancement of Science, and has appeared on Radio 4 speaking on the same topic. Aryanne has spoken at the Leeds and York Institute of Directors breakfast meetings on ‘Politics, Power and Profit’ and contributed to the Institute of Directors’ *Director* magazine; and has given an address at the British Psychological Society’s Annual Conference on ‘Stress Levels Among South Yorkshire Probation Officers.’ She is a member of the British Psychological Society’s Special Group in Coaching Psychology and holds general membership at the Society’s Division of Occupational Psychology. Aryanne is also a Member of the Association for Coaching.

Note from the Author

This book focuses on your skills and resolve while working with challenging clients. In writing the book I am not seeking to advise you, the reader, on how to handle your client relationships, but rather to offer you my experience and know-how as someone who has coached and worked with many clients on these issues. In addition to reading this book, you might want to seek the professional services and advice of a coach, business psychologist, or consultant, each of whom should be able to offer you tailored, detailed, and impartial counsel on the more challenging issues you might face when managing and working with difficult customers.

Acknowledgments

I would like to send my heartfelt thanks to a number of people whose input helped me as I wrote this book.

My gratitude goes to all of my clients who have spoken with me over the years about their experiences of working with their more challenging customers. I am grateful to the very many of you who have shared with me your successes, frustrations, reactions, and strategies for managing difficult, awkward, and downright unreasonable clients and for handling the dynamics created by these challenging internal and external customers. Because of my commitment to confidentiality I am not going to name any of you, but I hope that each of you can receive the thanks I would like to convey to you nonetheless.

I'd also like to acknowledge the value I received from the several clients and contacts that allowed me to pick their brains at the start of the writing process. These conversations were really helpful to me as I made decisions about how to structure and focus each of the chapters in the book. I send my thanks to each one of you gratefully and again, out of respect for the confidentiality issues, anonymously.

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Finally, I'd like to send my appreciation to the team at Palgrave Macmillan for their effective collaboration on the production of the book.

Overview

WHAT THIS BOOK IS ABOUT

This book is about working as a supplier to challenging internal and external clients. It is about building effective business relationships with difficult customers with whom you need to work and with whom you need to sustain viable and productive alliances whatever the complexities of the relationship. The book focuses on the issues involved in working productively with:

- External customers who, even though they often have considerable choice about who to hire, and have hired you to do certain things for them, may make life difficult for you nonetheless.
- Internal customers who often have to approach you as their designated supplier but may not see their way clear to working productively with you for any number of reasons, some of which may be personality based, others of which may be politically motivated.

The book is written from the perspective that in today's increasingly demanding business environment, suppliers have to demonstrate commitment, skill, and dedication to their client's cause every time they undertake work on behalf of every one of their clients. Believing that you have something valuable to offer to your clients isn't enough. Your clients have to believe it too. One of the key factors through which they can come to this conclusion is the deftness with which you handle them when things go well and when they do not.

The way in which you handle your clients – in other words your *behavior* with them and the *quality of the relationship* you build with them – has to convince them on an ongoing basis that you are an excellent supplier to deal with. This is especially true when your client is:

- A challenging and difficult personality to deal with.

- Worried, scared, or uncomfortable about how things are going on a particular project even if you are not.
- Prepared to use the project you are engaged on for political ends that have nothing to do with the work you are undertaking.

In other words, the way in which you construct your working relationship with each one of your clients needs to demonstrate to them on an ongoing basis that you:

- Know what you are talking about.
- Will assiduously and actively apply your knowledge and skills to their specific issues throughout the lifecycle of the project.
- Can be trusted to complete the tasks assigned to you on time and in a high quality manner.
- Will look for opportunities to add value to the work you are doing for them whenever you can.
- Provide – and will continue to provide – products or services which are an asset to their business.
- Know how to work well with *them* – even if they have an agenda that could make your work on the project less than straightforward.

These are not easy things to do at the best of times with the most psychologically undemanding of clients. But they are doubly difficult things to do when you are dealing with a challenging, awkward, and temperamental character.

THE FOCUS OF THE BOOK

This book focuses on the skills and know-how involved in working effectively with clients despite the challenges and the obstacles that their behavior creates for you. It is about your willingness to use the specific behavior, which will enable you to work effectively with difficult personalities, ambivalent motives, and challenging conduct. It is aimed at those of you who work with one or more clients who:

- Are, in the main, troublesome and obstructive by nature.
- Vie with you for control of the projects that they have asked you to manage for them.

-
- Seem untrusting of you and reluctant to give you the room you need to discharge your responsibilities in an uncomplicated way.
 - Appear to work against you, at least some of the time.
 - Don't easily hear feedback from you aimed at addressing the tension their conduct creates in their relationship with you.
 - Possess unspoken motivations that result in them taking occasional or consistent actions that are not in the best interests of the project you are there to manage.

These are difficult dynamics to handle. The aim of this book is to equip you with the insight, skills, and strategies you need to work effectively with these complicated traits, so that more often than not you become adept at:

- Sizing up the dynamics of a particular client relationship before deciding how to handle the character and issues involved.
- Acting in ways that gain you the degree of influence you would like to have with your most difficult and demanding of clients.
- Avoiding the situation in which your enthusiasm for your job dissipates as you struggle to manage a particularly challenging customer.
- Preserving the greater part of your energy and resolve for the aspects of your role that you most enjoy.
- Securing repeat business from a range of your most troublesome customers and clients, whatever the level of difficulty associated with working with each of them.

While this book will guide you through a process whereby you step back from your most testing client relationships and evaluate how to handle each of them more effectively, it will also provide you with pointers on how to handle your more reasonable clients with greater deftness and dexterity.

YOUR ROLE AS A SUPPLIER

It is probably not an overstatement to say that you, as a supplier, get paid to use the right behavior at the right time with each one of your clients. An approach which convinces one client that you are an excellent supplier to deal with might not work quite so well

with a different client who has different values, a different role in their organization, or who responds favorably to different things. Similarly, the skills with which you handle one awkward or testy client in one situation might not be quite the right set of skills to use with a second awkward or testy client in a slightly different situation.

This book will show you how to approach the most challenging of customers and the most interpersonally taxing of client-handling situations. It will show you how to select and use influential, service-oriented behavior with a variety of demanding and awkward characters, some of whom are deeply provoking, and in a variety of highly pressured and critical interactions with them. It will help you to step back from some of the most complex client-handling situations you deal with, and:

- Recognize what factors cause a relationship to become complicated.
- Understand what might be driving your client's use of counterproductive, emotional, or otherwise challenging behavior.
- Assess what your client actually wants from you.
- Determine when and how to draw the line should your client's actions jeopardize either your integrity or the outcomes of the project you are managing for them.
- Decide how to address the issues underlying their troublesome conduct so that your client comes to the conclusion that they and their project are in good hands.
- Wherever possible, preserve your working relationship with your client before you decide that they are simply unmanageable and you would be better off without them.

WHAT YOU WILL GET FROM READING THIS BOOK

This book will help you to decide how to handle your most challenging clients more effectively by:

- Exploring the issues of trust, responsibility, and control that lie at the heart of most client–supplier tensions.
- Understanding how to address these tensions so that your client feels understood, safe, and sufficiently in control or knowledgeable about the work to be comfortable working with you.

- Appreciating the benefit to you of investing in resolving smaller issues as and when they occur, rather than ignoring or downplaying them to concentrate on the larger issues you are handling.
- Giving due regard to the trust being placed with you by clients who ask you to manage issues on their behalf, issues which they do not have the skills or knowledge to handle for themselves.
- Appreciating the degree of risk which some clients might think they are taking by placing themselves and their project in your hands.

MY BACKGROUND AND WORK

I am a Chartered Psychologist, and began working as a business psychologist in the late 1980s. During the following five years I worked for three consultancy firms before deciding to set up my own business in early 1994. I made this move because I wanted to spend the greater part of my time working directly with clients, rather than managing colleague relationships. Some of my initial projects were carried out as an associate to smaller consultancy firms. Then, in January 2000, I set up Oade Associates to design and deliver bespoke executive coaching programs, tailored professional skills workshops, and custom-made conference scenarios.

In this work I combine business psychology with the skills of professional actors. We create real-life scenarios that reflect the customer handling, leadership and influencing, negotiating and conflict resolution, and political management issues that my clients deal with in their day-to-day work. Since starting Oade Associates, I have run hundreds of executive coaching programs and professional skills workshops for managers and leaders based in the United Kingdom, Europe, and North America. Many of these projects have involved working with clients on the reality of selecting and using behavior that proves effective with challenging internal and external clients.

In my coaching programs and workshops I ask clients to step back from their day-to-day work with their clients and customers. I ask them to reflect on the quality of the behavior they use when things are going well for them, and to compare that with what they do when they are under pressure. Then, with the help of my professional actor colleagues, I recreate the very meetings my clients

find most challenging, meetings in which they need to handle the dynamics created by a challenging customer. I help my clients to revisit these meetings using different and more productive behavior, skills, and tactics, behavior that is selected with the specific aim of enabling them to handle a situation effectively, so that they retain influence, credibility, and control.

I coach and work with clients to raise their understanding of the links between their intra-personal world – their values, character, and personality – and their inter-personal behavior: the behaviors, tactics, skills, and strategies they use when working with a challenging customer. Clients practice their new approaches until they are satisfied that they can go back to work and use them straight away. As a result of working in this way clients perform better in their roles, have greater influence with their customer base, and demonstrate sustained behavior change.

In addition to working one-to-one and with small groups I also work with conference audiences. In this case I develop a series of custom-made sketches that my actor colleagues subsequently enact live on stage. Audience members discuss and debate the action at round tables, so that they can learn from one another's experiences of handling similar instances, and decide which inter-personal skills and tactics work well in particular situations and which don't.

This book comes out of my experience of helping many clients to develop the intra-personal resolve and inter-personal dexterity they need to perform effectively when working with challenging customers, and out of my belief that it is the quality of a person's people-handling skills, as opposed to their technical prowess, that largely determines who will gain and retain true influence with the most tricky of customers in the most challenging of workplaces.

How to Use This Book

THE CHAPTERS

This book is constructed so that each chapter focuses on one set of issues at the heart of challenging client–supplier relationships. You can dip into it as a source of reference on specific client-handling issues or read it from cover to cover. While each chapter does stand alone and can be read discretely, each one also builds on the lessons from the previous chapters.

THE CASE STUDIES AND SMALLER SCENARIOS

From [Chapter 2](#) onwards, the book introduces you to a series of case studies, each of which mirrors the realistic dynamics found in challenging client–supplier relationships. These case studies illustrate a series of situations in which clients behave in ways which are or appear to be:

- Unreasonably emotional or untrusting.
- Provoking to you personally.
- About concerns or issues that do not make sense to you.
- Likely to undermine the quality of your work on their behalf.

Some of the smaller scenarios you will find throughout the book, from [Chapter 1](#) onwards, are based on real-life dynamics or are an amalgam of several real-life situations. Because of my commitment to working in a way which honors client confidentiality, in each of these instances the details of the characters, the setting of the events, and the specific details of the scenarios have been fictionalized to protect the identities of the people involved.

Following an outline of the key facts in a case study you will find a section entitled ‘Analyzing the Dynamics.’ This section takes you behind the action. It describes the motives of the client in the scenario as well as the conclusions of the supplier as they try and handle the dynamics in the situation. This section identifies

the issues facing the supplier as they deal with their challenging client, and highlights the risks that the supplier takes should they mishandle their client and therefore the moment. It also takes a deeper look at the personality of the client, and identifies the conflicts that they perceive they face in the scenario, conflicts that account for their counter-productive and provoking behavior. This section goes behind the actions, words, and behaviors used by the client to help you to:

- Recognize the issues around trust, control, and responsibility operating in their relationship with their supplier.
- Understand their motivations and intentions.
- Appreciate why they are behaving in difficult and awkward ways.
- Identify the most effective way to resolve the issues which matter most to them, even those that are not apparent at first glance, but that are central to their dilemma and their behavior.
- Handle the situation effectively so that the relationship is put back on a reasonably even keel and the project can proceed along lines that are viable.

YOUR CHALLENGING CLIENTS

Periodically, the book invites you to consider your responses to a series of questions about your own challenging clients. Each question is followed by a space in the text so that you can jot down your answers to it if you want to. These questions provide you with an opportunity to apply the key points from the previous sections of the book to your client relationships. The questions encourage you to make decisions about what you could do differently and better when handling your most troublesome clients, helping you to get the most out of the process of reading the material.

WHAT THIS BOOK WON'T DO FOR YOU

This book will help you make the most of what you have got: technical competence and a quality service. What a book like this cannot do is compensate for a lack of the technical skills you need to perform effectively in your role. It assumes that you do have something valuable to offer to your clients but need a little extra

assistance to put your offer across well to your more troublesome and taxing customers.

WHAT THIS BOOK WILL DO FOR YOU

Overall, this book will show you how to handle complex and challenging client personalities and situations effectively, and should help you develop increased options for managing your most difficult customers. Of course, there may be customers with whom you simply don't want to work and, in some cases, you may be able to cease working with them. But, assuming that you cannot or will not do so, either because your customers work for the same organization as you or because you need their business, this book should help you to handle the issues involved in working with these challenging clients more effectively and enable you to retain influence and credibility with the most awkward of customers.

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Handling Challenging Client Behavior

It's Your Responsibility

YOUR RESPONSIBILITY AS A SUPPLIER

A key premise behind this book is that no matter how baffling, unreasonable, or provoking a client's behavior may be, and no matter what industry or part of the world you work in, it remains your responsibility as the supplier in the relationship to take the lead in finding a way forward and for trying to address a whole range of issues to your client's satisfaction.

I adopt this view throughout this book, including when discussing situations in which your client perceives that there is an issue between you – one that they believe you have caused – and you do not share this view. Even in this scenario, one in which you may be tempted to think your client's view is:

- Primarily about their wish to exercise power over you
- Eccentric
- A waste of time
- Out of line
- Not worth indulging
- Or politically motivated, and therefore not really about the quality or process of your work

I still maintain that the primary responsibility for resolving the issues between you sits with you as the supplier in the relationship.

THE CHALLENGE OF BEING A SUPPLIER

Working as a supplier is a challenge. You get paid to provide a service or a product, and you are judged, often mercilessly, by your clients on your capacity to deliver within budget, to quality, and on time. But you are also being judged on a separate and parallel set of criteria too. Your client is also assessing the extent to which *they want to work with you*. This evaluation usually involves forming a view about the skill with which you handle:

- Them.
- Their expectations.
- Their anxieties.
- Their fears.
- Their disappointments.
- And their concerns.

And this remains the case whether or not they actually make any of these issues an explicit part of their discussions with you.

THE ROLE OF SUPPLIER

You may be more comfortable thinking that your role starts and ends with the mechanics of your product or service. In other words, you may decide that your primary function is to manage a process in which the product or service you are offering is installed, implemented, or completed to the satisfaction of your client.

And you would be right. It is.

But, if you define your role solely in these terms, and fail to accept responsibility for managing your client's reactions to your work and to you, you risk mishandling a key part of your role as *your client defines it*.

You simply cannot divorce the technical aspects of your role from the way in which you handle the character and personality of your client, no matter how tempted you might be to think this way. You are managing a project on behalf of someone, your client, and their view of *how you do what you do* – how you manage *them* – is just as crucial to their perception of your overall competence as is their view about how you approach the technical aspects of what you do.

Ultimately, it's the quality of the relationship that you build

with your client that counts. It's the skill with which you handle both the issues they put to you and the character traits that they demonstrate, especially when things go wrong, which will mark you out in their minds as an excellent as opposed to an average or poor supplier.

Your job is very much to manage your client – as well as the nuts and bolts of the project – and this is never more true than when your client is a difficult character and behaves in ways that you find counter-productive, wearisome, or unreasonable. Your client won't see it that way. From where they are sitting, given:

- Their role
- Their political agenda
- Their workplace values
- And the pressures they perceive to be on them

their behavior makes complete sense. Even if it isn't apparent to you, there will be a reason behind their challenging behavior, and it's one you need to understand, take on board, and manage.

RELUCTANT CLIENTS

In this book I take the approach that it is your responsibility as the supplier to engage with and handle your client's behavior, no matter how difficult that behavior may be, throughout the lifecycle of the project you are managing for them. You are the supplier and your client is the client. And they remain the client whatever the circumstances and whatever the complexity of the relationship between the two of you.

Many clients can choose which suppliers they work with: in this sense they have carte blanche and get to decide who they work with, when, over which issues, and how. But other clients can't select their suppliers because their choice of internal supplier is prescribed for them by their own organization. And some of these internal clients make for reluctant recipients of the services on offer from their internal suppliers. Perhaps a busy trading desk head in a pressured trading environment does not want to have their books examined and, as they would see it, judged as part of an internal audit process. Perhaps a construction engineer sees little point in participating in an internal performance evaluation process

when they would rather be ‘doing the work.’ In other words these clients, people who don’t have a free hand in selecting precisely whom they will engage and over which tasks, can experience their relative lack of choice in the matter as irksome and can regard the services on offer to them not as a useful provision but as onerous waste of time.

But, and this is the key point, even against this backdrop it is still your job as the supplier to engage with your client as best you can, remembering that your client will provide feedback on you and the work you do for them to other influential people in your organization. And that feedback likely has significant sway over the views that are formed about your effectiveness in your role by your managers and other senior opinion-formers.

THE CLIENT REMAINS THE CLIENT

So, your client remains the client whatever the situation between you, and the need to take responsibility for handling your client effectively whatever the circumstances sits with you. However, that doesn’t mean that any unreasonable or provoking behavior that they use ceases to be anything other than unreasonable and provoking to deal with. It doesn’t mean that you are to overlook the degree of difficulty your client might pose to you or downplay the degree of challenge they may cause you.

Taking responsibility doesn’t imply that you are at fault in some way and that you deserve to be subject to challenging behavior from your client. It doesn’t mean that you have to apologize, grovel, or become answerable for issues for which you are not accountable. Taking responsibility doesn’t presume that you have got something wrong, although there might be situations in which you have mishandled or misjudged some of the key issues or personalities before you. What taking responsibility does mean is that you need to:

- Manage your behavior at all times so that it comes across as productive and effective to your client.
- Recognize the *impact* of your behavior on your client at all times and use an approach that makes sense to them.
- Look at the situation from the point of view of your client and address the issues that matter to *them*.

WHEN IT GOES WRONG

Let's explore what these three points might mean in the context of some examples. Consider the following two scenarios:

Scenario one

A time-critical office move within the same office block in a global consultancy business starts to fall behind schedule. It falls one, then two, and finally three days behind plan, and results in some workstations being partly assembled rather than fully assembled at the end of the week by which the work should have been concluded. The facilities manager in charge of the move cites various technical difficulties and unforeseen issues to account for the delay to his internal clients. The delay causes inconvenience and increasingly irritation. Many of the consultants' files and paperwork remain in boxes, many others have no access their computers, and others still can turn their computers on but don't have a reliable broadband connection. In frustration several consultants start to work from home, which causes additional complications, as they cannot contact one another as easily as they could when they were in the same office space.

The office manager who is charged with overseeing the move on behalf of the consultants feels vulnerable and exposed. He does not work in facilities management, but manages the office in which the consultants work. He lacks the know-how to understand the complexities of the technical side of the move, and doesn't really understand what the delay is about. Unable to provide his manager or the impatient consultants with reassurances about when the project will complete, he starts to fear for his reputation with all of them. The office manager begins calling the facilities manager in charge of the project on the hour every hour, and conducts himself during these calls with increasing ire and frustration. The facilities manager regards these calls as a distraction, something that takes him away from the work he wants to do on behalf of the office manager. His approach to the series of calls he receives is to provide the office manager with factual, technical information to clarify what will be done by when, in the hope that he can structure his client's expectations accurately, obviate some of his discomfort, and reduce the number of calls he receives from him.

Unfortunately, his well-intentioned attempts to reassure the office manager that ultimately all is well, if a little behind schedule, do not mollify him at all. In fact, if anything they inflame him, and he becomes more and more difficult to deal with, much to the annoyance of the facilities manager, who believes he is doing everything he can to provide a high-quality service, and does not understand why his client is getting angrier with him.

Scenario two

A production engineer in a small company feels let down that his long-time supplier has failed to provide him with a consignment of valves without which he cannot complete his work for his main customer. He fears that he will lose future business from that customer if he cannot meet the deadline on this critical order. His supplier, at whom the production engineer shouts and swears down the phone, cannot understand why years of excellent service on her part seem to count for nothing now that she has been unable to fulfill one order on time. She apologizes for the lateness of the order, before reiterating her point of view that one service failure should not negate a ten-year business relationship. She is astounded at the degree of anger expressed in return by her client, who tells her she is 'out of touch' and 'not on the same page as him.' Her subsequent attempts to describe what she is doing to hasten the completion of the order do nothing to assuage her client's ire towards her. She ends the call visibly upset at the way she has been treated, having made no obvious headway in getting her relationship with her customer back onto an even keel.

In both of these cases, a supplier responds to an increasingly emotional client with reasonable but ineffective arguments, arguments which exacerbate their client's discomfort rather than reducing it, and which result in their client actually thinking less of them rather than being satisfied with their efforts on their behalf. Neither supplier handles their situation well, even though both of them want to do their best. Furthermore, both suppliers believe that the points that they make to their clients are sensible, clear, and made with their client's best interests in mind.

What do they get wrong?

HANDLING ANGRY CLIENTS

Well, basically, neither of them takes responsibility for the impact of the delay on their clients and their clients' work. Neither of them tries to get behind the facts to understand why their client is getting so excited about the situation. In fact, neither of them asks even one question aimed at identifying:

- Why their client is so upset.
- What issues the delay creates for them.
- Beyond the obvious, what else they could do to help make the situation more comfortable for their client.

The problem that the two suppliers face is that they only address the issues that matter to them – the technical issues at the heart of the project in the first scenario, and in the second, the fact that the two of them have worked together for a long time – without addressing *what the delay means to their client*. They don't explore any of the fears that their client has about the consequences for them of the hold-ups in their projects, hold-ups which they, as clients, are powerless to prevent or influence, but which could have severely unpleasant consequences for both of them.

So, what could each of the two suppliers have done differently and better?

If each of them is to demonstrate to their clients during this period of heightened tension that they remain good suppliers to deal with despite the present adverse circumstances, both suppliers need to put themselves into the shoes of their client and understand the stresses and strains which their client is experiencing *from the client's point of view*. They need to ask questions which prove that they are concerned about the *consequences of the service delays for their client*, and then listen without prejudice to their replies.

Examples of suitable questions to ask include:

- What issues is this delay creating for you?
- What actions could I take which would make life easier for you while we work hard to remedy the situation?
- What risks has our inability to get the work done on this occasion caused for you?

- What opportunities are you unable to take advantage of because of this delay?
- What does this delay mean for your business?

Having asked questions like these, it is then vital that the supplier listens to the answer without:

- Becoming defensive.
- Justifying the service delay.
- Arguing about perceptions.

ASKING THE RIGHT QUESTION IN THE RIGHT WAY

The supplier needs to keep the conversation about what the delay means to their client, the very act of which will demonstrate to their upset customer that they are:

- Aware of the situation as it affects them.
- Understand what has happened to them as a result.
- Taking responsibility for their actions.
- Urgently addressing the issues.

Listening to the client as they tell their story is key to mollifying their ire. Technical information about timescales and what is being done by when *apart from seeking to empathize with the situation the client is in* simply won't do it.

Each of the above questions, and others like them, demonstrates to an upset client that the supplier is genuinely aware of the difficult position their own failure to deliver on time, however unintentional that failure, has created for their client. They demonstrate that the supplier is keen not to lose the:

- Goodwill
- Trust
- Or active commitment

of their client as they seek to remedy the situation as soon as possible.

It's all a question of responsibility. Failing to ask questions like these could exacerbate a client's anger as they jump to the

conclusion that their supplier is out of touch with *their* reality, doesn't care about the mess they have created for *them*, and is acting irresponsibly towards them; or else, is simply justifying their poor stewardship of their client's affairs.

Many suppliers I have worked with fall into this trap. Only seeing things from their own point of view, they readily try to use their technical knowledge or a series of rational, logical arguments to address what are essentially emotional issues – fears and anxieties – in their client's working life. And it doesn't work. These suppliers are often baffled when this straightforward, factual approach to a primarily emotional issue makes the situation worse, and some of them then jump to a conclusion of their own: that their client is unreasonable, excitable, and potentially unmanageable.

Suppliers who fall into this trap have come to regard the work they are doing for their client as somehow a separate issue from *the impact the process of that work* has on the working life and reputation of their client when things don't go according to their client's expectations. And, under these circumstances, business relationships that were viable if uncomfortable can quickly become broken and unrepairable.

THE BENEFITS OF TAKING RESPONSIBILITY

So, all in all, when things go wrong, taking responsibility for asking the right questions in the right way is the best strategy as a supplier. Your questions need to demonstrate to your client that you, as the supplier, are taking responsibility for the impact of your service delays on your client. This approach will provide you with the best chance of:

- Retaining influence in a difficult situation.
- Preventing a tricky situation from spiraling out of control.
- Building credibility with your client despite the tensions between you.
- Influencing the way in which the issues between you are resolved.
- Finding a way forward which puts your project and your relationship with your client back on track.
- Proving your trustworthiness and competence to your client.
- Creating a deeper psychological contract with most clients,

one in which they place greater faith in your abilities and you gain greater latitude with them.

- Building a more effective working relationship with most clients, most of the time.

CHALLENGING, AWKWARD CLIENTS

Of course, not every challenging client situation involves something going wrong. Some challenging client situations are primarily about a difficult and awkward personality using difficult and awkward behavior. But, even in this case, the approach I adopt throughout this book is that, whatever the specific scenario and the ins and outs of the situation, it is worth your while as a supplier to:

- Ask questions which enable you to explore the situation from the point of view of your client.
- Work hard to understand the impact of the work you are doing for them on your client, their key workplace relationships, and their reputation, especially when things don't go according to plan.
- Identify and address the issues which matter to your client at times of heightened tension, and definitely before you attempt to address your own concerns.
- Make clear your commitment to working in ways which make sense to your client.
- Demonstrate that you have thought about the impact of the situation on your client and are aware of any discomfort they are experiencing.

This is all the more skilful a thing to undertake when you are dealing with an awkward and difficult personality. But it is do-able.

Consider the following scenario:

A department head in a hospital doesn't want to participate in the internal pharmacy inventory which she is required to complete each year. She is a duplicitous and oppositional character, someone who regularly states one thing in a meeting but who subsequently handles the issues completely differently once she has returned to her desk. When the pharmacy team member assigned to her department arrives

at her office for the preliminary inventory meeting, she tells him that his work is a waste of her time and, in unpleasant and snide tones, informs him of her opinion that his duties do not provide her with a service, as he seems to want her to think, but actually represent another problem for her to manage. Then she lets a silence fall and watches the pharmacy team member carefully. The pharmacy team member is a conscientious and diligent man, by no means unassertive, but certainly not up to handling this degree of rudeness and aggression from a colleague. He sits in front of her and is simply stunned into silence.

In this scenario, a supplier is so astonished by the attitude of his internal client that he cannot find anything to say to her following her offensive and provoking comments to him at their initial meeting. By failing to speak, understandable though that reaction may be, he doesn't do himself any favors. His antagonistic client will interpret his silence as a weakness, and be all the more inclined to repeat her insulting behavior during future meetings, should she deign to schedule any.

While we can sympathize with the pharmacy team member's unexpressed view that his client's conduct is so far outside the norm that he shouldn't have to deal with it, the fact is *he does have to deal with it*. It is beholden upon him to find something suitable to say to her in the moment she is rude to him, something that successfully alters the insulting dynamic she wishes to inculcate into her relationship with him. Otherwise he will, for the length of time in which he is engaged on this project, simply be setting himself up for further verbal attacks from a client who will expect to get away with it, as she appears to have done on this first occasion.

Difficult though it may be for the milder of the two characters, the pharmacy team member really does have to take responsibility for handling this situation and his unpleasant client as best he can. He needs to respond effectively to what is said to him at the time at which it is said. If he doesn't, he may find that his client quickly becomes unmanageable and that he doesn't get the input he needs from her to perform his role effectively. He will then have to either admit defeat to his own boss or submit a substandard report, neither of which will be palatable options for someone who takes pride in the quality of his work.

So, how could he respond to this irascible and difficult character?

QUESTIONS TO ENCOURAGE YOUR CLIENT TO THINK

The pharmacy team member needs to square his shoulders and ask his client some well-formed questions, the aim of which is to get her to think through the implications of what she has said while remaining non-judgmental in his attitude towards her. Suitable questions to ask include:

- What is it about the process of the upcoming audit that you are uncomfortable with?
- What is it about the process of working with me that leaves you feeling uncomfortable?
- Given that I have to complete this audit as a key part of my role, how would you like me to proceed?
- I understand that you would rather not be involved in this audit right now, but I have to proceed with it. What issues would you like me to take into account as I do that?

All of these questions play back to the client the consequences of her opening gambit while keeping the conversation on an even keel. And all of them address the key underlying issue behind the client's aggressive opening to the meeting: her discomfort with having to participate in the audit. But none of these questions falls into the trap of:

- Evaluating the client's behavior.
- Complaining about it.
- Taking her aggression personally.
- Escalating the issues between the supplier and his client.

Instead each of these questions achieves three things for the supplier. Each question enables the supplier to:

- Retain a measure of control in a potentially abusive situation.
- Demonstrate to his client that he is not intimidated or thrown by her aggressive tactics.

- Depersonalize the discussion he is having with her.
- Place his client in the position of having to find an answer to the awkward double bind in which she has attempted to place him.

In other words, these questions require the department head to find a way forward despite her aggression towards her supplier and despite her obvious lack of enthusiasm for the audit. They do this by subtly assuming that, if she thought a bit more about it, she would be prepared to find a way forward, one that enabled her to participate, even if it is with a degree of ill grace.

NEUTRAL TONE

However, to achieve these aims the supplier must ask these questions in a neutral, non-judgmental tone without any hint of chagrin, peevishness, or aggression of his own. This is vital. This dispassionate, objective tone, in and of itself, is a key part of his strategy for the meeting as it conveys to his client that he:

- Is well able to handle her aggression.
- Will not get defensive when confronted.
- Will not end up on the back foot justifying his role in the organization.
- Is quite capable of choosing how he responds, even when verbally attacked at the start of a meeting.

In other words, by adopting a measured and ordinary business tone, the supplier demonstrates that he is not fazed by awkward, unreasonable behavior in his client, doesn't take it personally as she might have hoped, and is quite competent to handle his client's challenging persona. He demonstrates that his only agenda is to do his job as effectively as possible, and that he expects his client to assist him in doing so, despite her obvious distaste for the tasks that sit with him.

We will return to this scenario in [Chapter 5](#) to see what happens when the department head escalates her tactics to include a concerted attempt to injure the pharmacy team member's reputation. Those of you familiar with the behaviors employed by the internal client in this scenario might like to refer to Chapters

3, 4, and 5 of *Managing Workplace Bullying: How to Identify, Respond to, and Manage Bullying Behavior in the Workplace* (published by Palgrave in 2009). These chapters outline additional effective strategies which you could employ when faced with the kind of contemptuous tactics used by this client so that the work you are managing can proceed according to plan.

UNDERSTANDING THE DYNAMICS

As we have just seen, the extent to which any particular client is prepared to adopt a less unreasonable approach depends to some extent on how well you handle them. But it also depends on their willingness to be mollified. In other words, it depends on their character and their choices. Some clients may always be, in the main, awkward and obstreperous characters to deal with no matter how skillfully you handle them. But, by taking responsibility for handling their challenging behavior, rather than choosing not to engage with it, you give yourself the best chance of preventing a situation in which you:

- Become unduly upset by your client's unreasonable nature.
- Find that your energy gets sapped by a series of unresolved issues that sit between you, to which your client keeps returning.
- Experience your client as someone who becomes progressively more and more difficult to deal with.
- Lose business as your external client goes elsewhere part-way through the project or on its completion.
- See your reputation damaged as your internal client bad-mouths you to other colleagues.

The following chapters will show you how to recognize and handle a range of key underlying issues in a variety of client-handling situations with a spectrum of awkward customer personalities so that:

- The matters between you are brought to a timely resolution.
- The project you are handling can proceed along effective lines.
- Both you and your client can move on with your working relationship intact and, quite often, the better for it.

relationships with your more troublesome clients productive and open. My hope is that this chapter and the subsequent ones will provide you with much food for thought and plenty of practical, pragmatic solutions to the client and customer-handling issues which currently tax you the most.

SUMMARY AND NEXT CHAPTER

This chapter sets the tone for the rest of the book. It explores the challenges inherent in adopting the role of supplier, a role that is by no means an easy role to play, whether your client is a colleague from the same employer as you or works for a different organization from you. The chapter:

- Proposes that no matter how challenging a particular client may prove to be it is your job, as the supplier in the relationship, to take responsibility for working with their behavior and handling it effectively.
- Acknowledges that, whether they say so or not, most clients will be judging you on both your technical ability to do the work they place with you and on the degree to which they want to work with you.
- Highlights that a key part of your role as a supplier is to manage your client and your relationship with them, as well as to handle the mechanics of the project you are there to do.
- Suggests that no matter what the circumstances or the quality of behavior they use, it falls to you as the supplier to take responsibility for addressing your client's concerns and resolving the issues they put to you to their satisfaction, wherever possible.
- Puts forward the view that this remains true even if your client is behaving in ways you don't like or understand, and which seem unreasonable to you.
- Suggests that even in this situation, one in which your client's behavior is provoking to you, it makes sound business sense and good reputational sense for you to take the lead in addressing and seeking to resolve the issues which are causing them to behave in this way.
- Highlights that the benefits to be accrued from taking responsibility are worth the hard work and effort involved in handling a difficult client situation effectively.

- Clarifies the difference between accepting responsibility and being blameworthy.
- Identifies just how difficult it can be to handle a client who is upset, angry, or aggrieved at something that has gone wrong on a project which you didn't intend and which you are trying hard to resolve.
- Suggests a series of strategies you could employ when your client becomes upset and angry, or when your client doesn't want to receive the service you are there to provide.
- Acknowledges that there may be situations in which you want to draw the line and cease working with a particular client.

[Chapter 2](#) examines a common dilemma facing clients. These clients need to work with suppliers who possess a degree of technical knowledge and expertise that the client does not personally have. In other words, your client recognizes that they need your skills but is discomfited by the fact that you know more than they do about a whole range of key project issues. They feel vulnerable and professionally dependent on you for advice and guidance, and this is an uncomfortable position for them to be in. [Chapter 2](#) highlights how toxic this dynamic can be for some clients. It explores how to set up and manage your relationship with a client in these circumstances to make it safe for them to extend trust to you throughout the lifecycle of the project, especially at times when they do not fully understand the ins and outs of what you are doing for them.

Reputational Risk

Your Client's Dilemma

CLIENTS WHO PLACE THEIR TRUST WITH YOU

Whenever a client decides to work with you they are placing their trust with you. They decide to trust that:

- You have the knowledge and qualifications you need to handle their project effectively.
- The claims you have made about your competence and aptitude for the work are true.
- You have the experience you say you have, and so are well placed to handle that work effectively.
- You will be someone they can work with, at least sufficiently well that the project comes in on time and to standard.

Most clients who work with you for the first time will talk with you, make an assessment about your suitability for the work, maybe take up references just in case, and then engage you to handle specific tasks on their behalf, confident enough that you will carry them out to the required standard. Those clients who have worked with you previously and who know you well probably won't need to go through the entirety of this process and will simply engage you. But, to some extent, they are still placing their faith in you anew every time they do so.

YOUR CLIENT'S DILEMMA

But, and most crucially, whether they say so or not – and 99 percent of clients don't say so – when they hire you, your client inevitably

places a degree of professional trust with you, and some also place a degree of their personal trust with you as well. And this is especially true when clients need you to carry out certain duties for them that they do not have the competence, the knowledge, or the skills to attend to themselves. This is a professionally vulnerable place to be, and the dilemma for most clients in this situation is:

- Can I trust this person to carry out these tasks to the standard I require?
- And if I do trust them, will I live to regret it?

When clients place their trust with you, they also place their expressed or unexpressed:

- Expectations about your conduct
- Anxieties about what might go awry on the project
- And requirements about the quality of the work

with you too. In most cases, most of the time, all of this will be fine. The project you are handling will proceed and complete in a way that leaves your client comfortable, and all will be well. But what about different occasions: those in which something goes wrong and your client perceives, rightly or wrongly, that the trust they have placed with you was ill advised?

Different clients will react differently in these circumstances according to the degree to which they:

- Think that their faith in you has been injured by your actions or omissions.
- Feel professionally – and sometimes personally – compromised as a result.
- Consider that their reputation with opinion formers, influential senior managers, or their own client base is at risk as a consequence.

Whether your client is self-aware enough to know it or not, whenever they decide to work with you they place themselves to some degree in your hands, and to some degree, they take on a level of professional risk should things not go as they want on the project. Assuming transparent motives on their part, if all does go

smoothly and the work you are doing proceeds to schedule and to quality, that potential risk may never be realized. But if something does go wrong, depending on the circumstances, that potential risk can become a frightening and immediate reality for even the most calm and composed of clients.

Let's explore these issues further by returning to the challenging dynamics experienced by the office manager and the valve supplier in the short scenarios from the previous chapter (see pages 5–7).

CHALLENGING DYNAMICS

In both of these instances, a supplier finds that the rational and reasonable arguments they put to their client cause further upset in someone already annoyed at a delay in the completion of their project. In the first instance, the facilities manager tries to address his client's growing anger by providing factual information and data to clarify for the office manager what will and what will not happen next on the delayed office move. In the second instance, the valve supplier apologizes for the lateness of the order before emphasizing the effective business relationship that she and her client have enjoyed for the previous ten years.

But in each case, words calculated by the supplier in the first instance to provide a description of the way forward, and in the second, to put one delivery failure into perspective:

- Increase their client's annoyance to the point of outright anger.
- Result in their client perceiving them to be out of touch with the issues facing them.
- Take their relationship with their client towards a point of breakdown.
- Leave the supplier feeling, in the first instance that their time is being wasted by an unreasonable client, and in the second, bemused, confused, and saddened.

We have already examined some of the ways in which these suppliers mishandled a key moment. Now let's examine the issues further by looking at the situation from the point of view of their vulnerable clients.

Both clients think that the actions taken by their supplier have

placed their reputations at risk with key people in their working world, and they also think that neither supplier is doing anything like enough to address the project delay and so protect them from a series of impending reputational hits. Both clients experience their supplier's well-intentioned but ill-advised words as evidence that neither of them is sufficiently unconcerned at a situation they are responsible for, and that neither is sufficiently motivated to remedy it.

In the case of the office manager, he is highly agitated about how the consultants he works with and the manager he reports to will react to what they might see, however unfair he might think it to be, as his complicity in a key service failure. And in the case of the production engineer, he is highly concerned that his company will lose its main customer's business as a result of being unable to fulfill their latest order due to a delay in receiving the valve consignment. And both clients place the responsibility for these potentially costly sets of circumstances fairly and squarely with a supplier who hasn't explicitly acknowledged the gravity of these situations, and who appears not to realize that it is they who are being held accountable for these circumstances. Neither supplier is *blameworthy*, as they haven't purposefully set out to create these sets of issues. But they are responsible for them, in the sense of being accountable for potential outcomes that their clients fear may damage their interests.

TOXIC CLIENT SITUATIONS

From the clients' point of view, both of these project delays leave them in a toxic situation. They:

- Need the office move and the valve order to be completed on time.
- Have little or no influence over these issues which are being handled for them by their suppliers.
- Have little or no control over the key factors which will determine what happens next.
- Still have to give account for these situations to other more influential colleagues or to their own customer.
- Need their suppliers to act in their best interests and, whether the suppliers would agree or not, in neither case does the client

think that their supplier is doing enough to get them out of a tight spot.

- Want their emotional responses to these circumstances to be explicitly acknowledged and responded to by their suppliers.

Let's explore the ins and outs of each situation in more detail to identify how the supplier in each case could have handled things differently and better. In the first instance we will focus on the issues from the point of view of the client, the office manager. In the second instance, we will focus on the issues from the point of view of the supplier, the valve manufacturer.

THE OFFICE MANAGER

In this instance, the office manager lacks the technological know-how to really understand what the delay in the office move is about. This places him in a tricky position with his own boss and with the impatient and influential consultants with whom he works. These people are colleagues who expect him to:

- Know what is going on.
- Understand the ins and outs of the office move.
- Have influence with the internal suppliers with whom he is working.
- Have answers to critical questions about the progress and timescales of the project.
- Do everything in his power to make sure the deadline is met.
- Succeed first time, every time.

There is no doubt that the office manager is highly motivated to succeed and to avoid perceived failure. He wants to bring the project in on time and to standard. But his ability to do so is limited because he is not able to move the project forward one jot by himself. He is dependent on the facilities management team to accomplish this for him. However, if the facilities management team is unable to find a resolution to the issues that are putting the project behind schedule, or if they do so too slowly to meet the project deadline, it is *he* who will be in the hot seat with his manager and with the consultants. They will hold *him* accountable and expect answers from *him*, answers he might not find it easy to give.

As the project falls more and more behind schedule, the office manager starts to feel more and more powerless and vulnerable, a particularly toxic combination for him. His potential reputational risk becomes, to his mind anyway, very real and frightening, and he starts to fear for his position, his reputation, and his credibility. In a ruthless environment such as a consultancy firm, one failure could be enough to lose him his job, and this reality takes a firm hold in the office manager's mind. It results in him becoming:

- Angry with the facilities manager whose – as he sees it – negligence and lack of application have resulted in the project running late.
- Furious as the calm and methodical demeanor of the facilities manager comes across to him as nonchalance in the face of his reputational risk.
- Concerned at the high degree of toxicity he now carries, as the consultants continue to apply increasing pressure to him.
- Increasingly exposed as his manager starts asking him pointed questions, wanting to know what the delay is about and what he is doing to address it.

Unless the facilities manager finds a way to convince his internal client that he *is* working flat out on his behalf, that he *does* understand the position he is in, and that he truly *empathizes* with his situation, he will find that his client continues with the view that his concerns are unimportant to his supplier. In this case he is highly likely to continue to:

- Take up his time with hourly phone calls.
- Treat him with increasing anger and disrespect.

The facilities manager needs, as an urgent priority, to invest time in his relationship with the office manager. He needs to arrange to meet with his client and:

- Update him on what has gone wrong, why it has gone wrong, and what he is personally doing to remedy the situation.
- Be prepared to listen without judgment to his client's concerns before making an empathy statement. The empathy

statement needs to explicitly acknowledge that he understands how challenging things have become for the office manager, and that he is highly motivated to do something about it.

This latter point is crucial. An empathy statement will demonstrate to the office manager that the facilities manager is taking responsibility for the situation his client is in, and does understand what it means to him. This approach will obviate some, maybe all, of the anger that the office manager feels towards his supplier. If the facilities manager fails to handle things this way, his client may form the view that he is in an unsafe, even hazardous, situation, and that his welfare is in the hands of someone who is out of touch and lackadaisical. Under these circumstances, his level of anger towards the facilities manager could increase further.

THE VALVE MANUFACTURER

In this second instance, the valve manufacturer needs to find a way of satisfying a client whose concern about losing business results in him verbally abusing her during a telephone call. In this case, the production engineer cannot complete his order for his key client without the much-needed consignment of valves. He becomes deeply frustrated at the attitude taken by the valve manufacturer, a woman to whom he has given business for over ten years. Her apology and assertion that a ten-year working relationship should not be jeopardized by one late order does not impress him at all. In fact, her words result in his becoming angrier with her, rather than less angry, as she had hoped.

He decides that she simply does not understand the position in which her company's failure to deliver has placed him. He hears her attempt to remind him of her previously exemplary delivery record as evidence of a degree of irresponsibility and negligence towards him at a time when he faces mounting concern about losing business. He is dismayed by her – as he sees it – apparent lack of concern for his unspoken fear that he might lose his main customer if he doesn't get this order out on time. However, he is so worried about losing his main source of income that he cannot put his fear into words, and never actually mentions it to her. Instead, he simply expects her to:

- Understand the pressures on him.
- Recognize the risks he carries.
- Pull out all the stops to sort out the situation for him.

However, these are not the points uppermost in the valve manufacturer's mind. The valve manufacturer thinks that her apology, and the fact that she has offered her client excellent service for over ten years, should be enough to placate his ire. She wrongly assumes that he will be lenient with her due to her company's long-standing and excellent working relationship with his business. And she cannot understand how her erstwhile valued customer could be so rude and offensive to her on the telephone, given the fact that they *have* done business over an extended period of time – and she *has* just apologized.

The valve supplier makes a number of fundamental errors in her handling of this critical call with her client. She:

- Wrongly assumes that he will share her relationship-oriented values and place an equally high regard on the longevity of their working relationship.
- Misreads his abusive tone and words, taking them personally, and fails to see them as signals which reflect just how much pressure he perceives himself to be under.
- Appears to be content that her track record of excellent delivery will somehow be enough to encourage her client to make light of the current delivery delay.
- Fails to tell him what she is in fact doing to remedy the situation, and to ensure that the valve consignment arrives with him as soon as possible.

In handling things this way, the valve manufacturer runs the risk that she will lose this client's business. This is not, as she might be tempted to think, because of one service failure over a ten-year period, but because she doesn't make it clear to her genuinely upset client that:

- She really does understand how badly placed he now is with one of his own customers as a result of her company's valves not arriving on time.
- Just because her company has offered him ten years of

excellent service she does not take this situation any the less seriously.

- She is highly motivated to do everything in her power to get her client out of this tight spot, one in which he has been placed by her company's failure to deliver, no matter how unintentional the failure.

These are challenging dynamics to handle. So let's explore similar issues in more detail in the context of a longer scenario. The following case study examines how a supplier caught in the challenging dynamics we have been discussing handles the situation so that they:

- Retain a viable working relationship with their client.
- Address their client's key underlying fears about the degree of reputational risk they perceive themselves to be carrying.
- Convince their client that they are taking their responsibilities towards them very seriously indeed, and are highly active in addressing their urgent concerns.

However, since not all customers are straightforward to deal with, this case study features an awkward and oppositional character who runs the online booking service for an international airline and who is a challenging personality to work with.

CASE STUDY 1: RISKY PROPOSITION

The online booking manager in an international airline feels under increasing pressure. For the past few months he has been working with a firm of technology consultants, managed by the technology lead consultant, on a series of complex system enhancements which will affect the display and functionality of the company's website. The enhancements are aimed at improving the quality and the speed of the booking process for every one of the company's customers in the increasingly competitive international online airline market.

As the design stage of the project draws to a conclusion and the installation period approaches, the online booking manager starts to get cold feet. The systems enhancements have taken months to design, and now that the go-live is upon him he worries that

the installation might not go according to plan. His specific fears center on the degree of disruption that customers might experience on the morning following the overnight installation. He doesn't want customers' access to the website, the functionality of the website, or the speed of the booking process to be compromised. His previous conversations with the lead consultant about these issues involved the technologist telling him that 'everything would be all right on the night,' and reassuring him that he understood the need to keep customer disruption to a minimum. However, deep down, the online booking manager is not convinced, and while he doesn't think his supplier is deliberately being disingenuous, he does think he is being overly optimistic.

The lead consultant in charge of the project is a calm and easygoing character. He is technically competent and keen to provide a seamless service to the online booking manager and his team, whom he recognizes work under constant pressure. He is also excited about the systems enhancements that he thinks will provide the airline with genuine competitive advantage in a tight market. His style is somewhat laid back and reactive. He is certainly more relaxed than the online booking manager. The lead consultant experiences the online booking manager as an uptight, tense, and direct character. He doesn't object to his style but does think he gets hot under the collar too often, and when in this mode, he thinks he is a poor listener, often getting one thought into his head that he repeats over and over again.

For his part the online booking manager regards the lead consultant as being a bit sluggish in his approach. As the go-live date approaches the online booking manager interprets the lead consultant's steady, relaxed demeanor with increasing suspicion, and becomes more piercing in his questioning and more demanding in his tone whenever he talks with him. The lead consultant tries to reassure his edgy client by providing him with a succinct and factual summary of the state of play on the project, an approach which he thinks is sound but which doesn't really seem to assuage his client's concerns. The lead consultant wants his client to feel confident that things will go well, but having tried unsuccessfully to reassure him, he alters his approach and focuses on the technical issues instead. He busies himself attending to the final preparations for the go-live, leaving the online booking manager to his own devices. Things quickly come to a head during the day before the overnight installation.

The online booking manager is already under pressure because sales figures are down for the day, following a competitor's decision to offer cut-price fares on certain routes. He decides that he cannot afford for there to be any further problems on the following day, the day after the overnight go-live. His main concern is his view that, no matter what technologists say, upgrades always disrupt the website. He does not want the hassle or the potential lost custom which will inevitably occur should customers try to book and find that the website doesn't load properly or that it ceases functioning part-way through the booking process. The online booking manager fears having to sit down and give account for outcomes like these to the sales director. He decides to test the water and see just how attentive the lead consultant is to this critical issue. He calls a meeting with the lead consultant at short notice. He tells his supplier that he wants to talk through last-minute details, when what he really wants is to leave the meeting feeling 100 percent confident that the go-live will not disrupt customers' experience of the online booking process one iota.

The lead consultant arrives at the online booking manager's office and finds his client waiting for him. The online booking manager tells his supplier that he wants an update from him on the steps that are being taken to eliminate customer disruption following the go-live. There are a number of ways in which the lead consultant could handle this situation. Let's explore three of them.

- The lead consultant, bemused that they are apparently going over old ground again, takes a deep breath and tells the online booking manager that he is doing, and has done, everything that he can to make sure that disruption to customers will be minimized on the following day. He sounds slightly baffled as he says this, even annoyed, as if he cannot quite see why they are having this conversation again.
- The lead consultant decides that his client is having last-minute nerves. In the split second he has to make up his mind how to handle this situation, he decides to offer him reassurance to help settle him down. He tells the online booking manager that, while he cannot guarantee that there will be absolutely no disruption to customers, he can assure him that the go-live will proceed according to plan and that he really has nothing to worry about.

- The lead consultant decides that there must be more to this meeting than meets the eye. He is aware that this particular issue is one they have spoken about several times before. Rather than assume that his client simply hasn't heard him on these previous occasions, he decides to find out what is on his mind. He asks the online booking manager what about the process of the go-live from that point onwards concerns him the most, and waits for an answer.

RISKY PROPOSITION: ANALYZING THE DYNAMICS

Let's take a look at what is happening in these three scenarios.

The first instance

The lead consultant is disappointed to discover that the topic of conversation at this impromptu meeting is, once again, the potential disruption to customers, which might result from the overnight installation. He has already talked through this aspect of the go-live with the online booking manager on several occasions, and believing that it would be pointless to go through all the ways in which he has designed the installation to minimize disruption, simply tells his client that he is doing and has already done everything he can to minimize customer disruption.

Sadly for him, this approach doesn't work. It causes the online booking manager to feel more anxiety, not less anxiety, and immediately after hearing these words the thought which runs through his mind is that he will only give permission for a 10 percent trial go-live instead of the full 100 percent installation which has been planned. Why do the lead consultant's words result in the opposite reaction from the one he intends?

First, the lead consultant makes the mistake of misreading his client's mood. He assumes that they are going over old ground again, instead of realizing that this revisiting of old ground is prompted by a new development. It does not cross his mind that the online booking manager is facing a very real crisis of faith, one which is of sufficient magnitude that he feels the need to question the lead consultant again on a key aspect of the installation process.

Second, his answer is short, delivered in a slightly annoyed tone, and lacks any substantive facts. It consists of one thing only: his

opinion that he has done everything he could do, and will continue to do everything he can, to minimize disruption to customers. The lead consultant's words, delivered in this low-key style, sound bland and uninspiring to the online booking manager, who hears them as evidence that the lead consultant is a bit uninterested in a matter of supreme importance to him. He forms the instant view that the lead consultant is not aware of what is at stake his end, and is going through the motions. He doesn't feel reassured at all. In fact he forms the view that the lead consultant is only looking at events from his techie point of view, and is divorced from the reality of what his work means for customers, the sales team, and himself. He thinks that the lead consultant does not appreciate the degree of pressure he is under. It is the manner of the lead consultant's delivery, as well as his ill-chosen words, that contribute to this impression being formed in the mind of the online booking manager.

Third, the lead consultant's answer, while quite true, is couched in terms that expect far too much from his tense client. He asks his client at a moment of crisis to believe in his *opinion* that all will be well. That is quite a lot to take upon himself, and assumes that he has the 100 percent faith of his client. It assumes that his client will readily accept his point of view as the only view to take on the situation of heightened anxiety for him. The lead consultant doesn't really do himself any favors by taking this approach. He doesn't give his client any *facts* upon which to make up his own mind. He doesn't give him any *data* from previous successful installations, from which he could form his own view about the likely effectiveness of this one. He doesn't take the time to understand what the question he is being asked really means. He opts for the easy way out, and falls into the trap of assuming that his own perspective as a technologist will be enough to assuage his client's concerns. He fails to take into account just how little knowledge the online booking manager has about the technological side of the installation process, and therefore just how vulnerable he feels because of his lack of understanding. He also completely fails to factor in just how much pressure the manager is under, and how this could affect his perception of threat, heightening it unduly. From the relative safety of his own position as the technical expert, he mishandles a critical meeting, failing to see things from the point of view of his client.

Overall, the online booking manager doesn't like the sound of the vague and blithe statement that everything that could be done has been done, and rather than be mollified by these words, he feels greater concern than he did before the meeting started. He mentally backs out of the deal in order to protect himself. He does not inform the lead consultant of the change in plan, but decides to present it first to the sales director. He closes the meeting already committed to the much reduced installation, and to telling the sales director that his reason for such a proposal is his concern about the quality of steps being taken by the technologists to eliminate customer disruption. This outcome will leave the lead consultant with the job of picking up the pieces from a go-live that has been reduced to a 10 percent trial run. It will also leave him with a lot of work to do to rebuild both trust and cooperation with the online booking manager and the sales director.

The second instance

The lead consultant correctly hears the question put to him as a signal that all is not well with his client, and thinks that he is getting cold feet. But although he makes an accurate interpretation of his client's mental state at the start of the meeting, he actually mishandles the conversation from that moment onwards. His attempts to reassure the online booking manager do not work. He tells him that he cannot absolutely guarantee that there will be no disruption to customers, but that he can guarantee that the go-live will go well, and that the online booking manager really has nothing to worry about. On hearing these words, the online booking manager thinks he is being patronized and forms the view that his very real concerns are being belittled. Because of his heightened anxiety about potential lost custom on the following day, rather than hear the phrase 'cannot guarantee that there will be absolutely no disruption to customers' as an honest statement of reassurance, he sees it as a red flag which suggests that something *might* go wrong. He then interprets the comment that the go-live will proceed according to plan and that he really has nothing to worry about as a tepid and unconvincing attempt to paper over the cracks. He tells the lead consultant that he will proceed with the go-live as planned, but on leaving the meeting – and behind the lead consultant's back – he intends to stall,

effectively stymying the project and leaving the lead consultant with nowhere to go.

Why do the lead consultant's words result in this outcome? Mainly because, once more, the lead consultant has passed on the opportunity to find out what is uppermost in the mind of the online booking manager, has failed to explore what is concerning him, and has failed to offer him any reply relevant to how he will manage his relationships with his team and his boss should something not go according to plan. Instead, he gives a reply which, while honest, raises the very real possibility that something *might* slip through the net. The online booking manager simply cannot take the risk, and opts out, leaving the lead consultant with a lot of explaining to do to his managers and to his team.

The third instance

The lead consultant recognizes that this is a critical moment for the project. Yes, he and the online booking manager have been here before, and discussed these very issues previously. And, yes, they are here again. But he decides that there must be a new reason for this repetition, and makes it his business to find out what it is. He determines to ask a question that will help him understand what is going on in the mind of the online booking manager. He doesn't give an opinion. He doesn't offer empty reassurances. He doesn't provide information. Instead he asks a question, a well-chosen question, and leaves a silence for the online booking manager to fill. He asks him what it is about the process of the go-live from that point onwards that concerns him the most. In the silence that follows, the online booking manager has a choice to make. He can either provide a clue as to his mental state and the source of his concerns, or he can pass the ball back to the lead consultant. He takes the former course, and tells his supplier that there is a management team meeting scheduled for two days hence at which he is to give a status report on the outcome of the website upgrade, especially as it relates to customer disruption and sales figures. The lead consultant seizes the moment, and suggests that he, and not the online booking manager, would be best placed to give that update. He asks the online booking manager if he would like him to accompany him to the meeting, and describe the outcomes from the go-live and the impact of the new-look website on sales.

This offer represents exactly the kind of practical reassurance that the online booking manager needs to hear. At one stroke it removes the specter of failure from his mind, places responsibility for giving account for the outcome of the installation with the lead consultant, and leaves the online booking manager free to accept whatever kudos might come his way for a successful installation without having to accept any of the blame and vitriol which might attend a less than successful installation. Most importantly, this offer represents conclusive proof to the online booking manager that the lead consultant is taking *full responsibility* for the outcomes of the work *as they affect him*. He is satisfied. The online booking manager decides to give permission for the full 100 percent go-live, and shows the lead consultant out of his office. The lead consultant must now deliver on both of his promises of an installation with minimum disruption and a presentation of a status report on the outcome of the installation at the management team meeting.

But, by managing his client so adroitly and by addressing the issues that matter to him in this practical way, the lead consultant has kept his project to schedule and on track, and avoided the fall-out of having to account to his senior managers and the airline's sales executives for a partial installation or no installation at all.

BUILDING INFLUENCE WITH CUSTOMERS FACING REPUTATIONAL RISK

This case study illustrates how being a technical expert alone does not necessarily win you the right to advise a client who believes they are facing a degree of reputational risk. It may well do with many of your clients some or all of the time. But with other clients, those who believe that they are carrying some degree of reputational risk in relation to the project you are handling for them, your technical opinion alone won't be enough to sway their view, no matter how experienced and competent you are. For these clients, your technical knowledge and skills won't win you the right to work on the project in the first place, but they will not be enough to retain you the degree of influence you would like to have when your client starts to worry.

With these clients, your technical knowledge, skills, and experience will not be enough to sustain their faith in you during

what they regard as times of heightened risk to them, and you will need to use another approach instead, one that is centered around *them* and their concerns. This approach needs to center on your willingness to:

- Invest time with your client at key moments.
- Ask effective questions and listen to the answers.
- Explore the significance of the issues you are handling to them.
- Understand what risks they perceive they are facing in relation to those issues.
- Identify how the project, and the way you are handling it, mitigates those risks.
- Avoid judging them and instead accept the validity of their concerns.
- Address those concerns in practical and straightforward ways, wherever possible.

STEPPING INTO THE BREACH

Having technical expertise in and of itself will not mark you out for influence per se with anxious clients or clients who are getting cold feet. Rather it is the *specific application* of your experience and knowledge to the *precise issues* which are concerning your client which will gain you influence at key moments – and which could, as in the case study above, make the difference between your being able to complete your project on time or not. It is only in the third instance above, when the supplier offers to step into the breach and report to his client’s managers about the outcomes of the project, that he is able to assuage his client’s anxiety. Let’s examine why this approach is successful, and what degree of risk it represents for the supplier.

First, the third approach succeeds in assuaging his client’s anxiety because it represents clear, behavioral evidence that the lead consultant wants to protect his client from any unpleasant consequences that might arise should the website upgrade cause disruption for customers that results in lost sales. From the online booking manager’s perspective this is putting the responsibility where it should rightly be. As far as he is concerned, he doesn’t think he should take the flak from the sales director or other senior

managers should all not go according to plan. As he sees it, he is not the one responsible for any of the potentially problematic outcomes. That responsibility sits fairly and squarely with the lead consultant, and so as far as the online booking manager is concerned, it is he who should front up and speak to the senior meeting. That way the online booking manager can attend the management team meeting safe in the knowledge that any censure will not land on him, but at least some of the kudos pertaining to a successful installation probably will. He is satisfied with both of these options, and allows the project to proceed to installation.

Second, this approach does represent some risk for the lead consultant, but not as much risk as he would be taking should he mishandle the moment and lose the right to proceed with the installation. The risk he takes is that something will go wrong during the overnight installation, that customers will experience some degree of disruption on the days following the work, and that some bookings will be lost. If any of these outcomes do occur, then the management team meeting might be a troublesome one for the consultant. But then again, it will be the first time he has met the senior team, and he has an opportunity to convince them, should he need to, of how effectively he is managing the aftermath of a partially successful or an unsuccessful installation. In his own mind, the lead consultant is pretty confident that there won't be much disruption to customers, so he forms the view that the risk he carries is limited. And if he doesn't take this line and doesn't offer to attend the meeting and give a status report, he risks losing the right to perform the installation at all, a situation that would result in:

- Lost income for the airline, his employer.
- A series of uncomfortable meetings with his own technology managers as he attempts to explain how he has mishandled a client so close to go-live.
- Another series of uncomfortable meetings with his internal clients as he tries to repair the damage done to his reputation and his relationships with them, and re-earn the right to complete the work.

On balance, he's better off agreeing to attend the management team meeting and give a status update report on the installation.

much knowledge, skill, and know-how they have about the issues you are handling for them.

- Highlights how easy it can be to mishandle clients at times of heightened anxiety for them.
- Suggests that one way of mishandling this moment is through looking at the situation solely from your own perspective rather than from your client's.
- Illustrates the dilemma faced by clients when they perceive that things are not going along lines they would like on a project, and that they face a degree of reputational risk as a consequence.
- Identifies the folly of using your technical skills alone to try to address these primarily emotional issues when clients raise them with you.
- Suggests that a better way forward is for you to invest time and effort in understanding the situation from your client's point of view, including exploring the reputational risk they believe they are facing, before taking responsibility for addressing these issues as best you can.
- Proposes that the option of stepping in to present status updates on technical issues to your clients' managers (or, indeed, their customers) will preclude your clients having to handle this potentially toxic situation without the technical know-how they need to handle it well.

Chapter 3 focuses on the thorny issue of working with controlling clients. It describes the pitfalls, stresses, and strains of working with clients who have a higher than average need to control, and whose controlling tactics impede the quality of work you are able to do for them, and adversely affect the quality of your working relationship with them. The chapter describes the intra-personal profile of a controlling client, and examines some of the key characteristics and behaviors they might use while in this mode. It identifies effective strategies you could employ while working with a controlling client, strategies which will minimize the counter-productive consequences of their controlling nature, build some degree of trust with them, and keep your relationship with them open and viable even during challenging circumstances.

Controlling Clients

The Interconnected Issues of Control, Involvement, and Trust

CLIENTS WHO LET YOU MANAGE THE PROJECT

Many of your clients will be quite content to let you handle the project you are managing for them as you see fit. They'll want some degree of influence in the process of your work, including, among other things, receiving regular updates from you on where you have got to with key issues, and regular reports on the nature of the outcomes you are creating for them. They'll want some say in the key decisions that need to be made, and will want to give you their view on other factors that affect the process of the work. But generally speaking, these clients will not experience your managing the project on their behalf as a diminishing of their own power or influence. So they will be content to relinquish most of the control of the day-to-day running of the project to you, and to play a more limited role than you play yourself in its process.

In other words, they will largely trust you to get on with it without feeling the need to watch over you or check up on you, and will therefore conduct themselves in a largely non-controlling way.

CLIENTS WHO DON'T RELINQUISH CONTROL

However, not every client will react this way, and some clients may have a lot of difficulty relinquishing control to you. Some clients may ask you to carry out activities on their behalf but then interfere and intervene at regular intervals, effectively obstructing you from doing your job in a straightforward and uncomplicated way. These clients have trouble with control.

The degree to which any client decides to control will vary depending on how:

- Much they are motivated by an inner need to control.
- Invested they are in wanting specific outcomes from the work, outcomes which might, on occasion, conflict with your understanding of what you are there to achieve.
- Effective you are at involving them to the extent that they need to be involved in the process of the project.
- Familiar they are with you and your work.

WORKING WITH CONTROLLING CLIENTS

Working with clients who exhibit higher than average degrees of controlling behavior can be quite a challenge. And understanding how to manage your relationship with averagely controlling and truly controlling clients so that these relationships become less troubling and time-consuming, rather than really energy-sapping, is the subject of this chapter. The shorter, first portion of the chapter examines the psyche of a controlling client to identify:

- Why some clients need to control.
- The pitfalls which clients create for themselves by using these tactics.
- What range of behaviors they might use when they are tempted to use a controlling approach.
- What non-controlling alternatives clients could use at times when they might be tempted to resort to controlling strategies.

The greater part of the chapter then identifies effective strategies and tactics which you, as the supplier having to contend with a controlling client's behavior, could usefully employ as you get to grips with the challenge of offering your client the most effective service you can despite the degree of difficulty their approach creates for you. This portion of the chapter focuses on:

- What connections between trust, involvement, and boundaries exist in the mind of a client who constantly or intermittently uses controlling behavior.

- Effective strategies you can employ to respect these connections and demonstrate to your client that you want to work in ways that make sense to them.
- The pitfalls of trying to control a controlling client: an understandable but ill-advised tactic that can backfire on you badly and exacerbate the situation between you.
- The business benefits of remaining committed to working towards your controlling client's best interests despite the provocation they cause for you.
- When and how to involve a controlling client in the process of your work.
- How to earn and keep your controlling client's trust, despite any difficulties they may inherently face in extending trust in the first place.
- The risks of becoming too unguarded with a controlling client who has granted you some latitude.
- How to use the freedom you do earn with a controlling client in a wise and helpful manner.

CONTROLLING BEHAVIOR: AN ATTEMPT TO MEET AN INNER NEED

Most clients who are controlling employ this approach in an attempt to *meet an inner need in themselves*. They may well be attempting to exert control over people, issues, and processes outside of themselves – including you, their supplier – but the genesis of the behavior lies within and is about a purposed attempt by them to handle something uncomfortable which is internal to them.

Clients who are more self-aware rather than less self-aware may well recognize this link even if they don't know how, or don't want, to address it. But many clients won't see the link at all. Some may be so blind to their own inner world that they simply don't recognize the connection between their intra-personal landscape and their interpersonal behavior and, indeed, some may also fail to see themselves as particularly controlling characters either. The issue for you as a supplier working with a controlling client is to recognize the behavior for what it is before employing behavior of your own which gives you the best chance of establishing an effective, influential dialogue with your client despite their penchant for using a controlling approach.

DRIVEN TO CONTROL: INNER MOTIVATIONS

There are many possible inner issues that a client might be attempting to address by seeking to control factors external to them. Here is a selection of possible intra-personal issues that might account for a controlling approach in one of your clients.

- Your client is afraid of something, such as the possibility of failing in their role or losing credibility with an important group of people: their peers, perhaps, or a group of their senior managers. So they adopt a controlling approach over matters that affect their work, and by extension, their reputation, which includes trying to control the process of any activities you undertake on their behalf.
- Your client feels, at a basic level, some degree of powerlessness as a person. They lack the skills, know-how, and competence to build effective, influential relationships at work. They try to compensate for their perceived lack of influence by exercising excessive control over you and the process of the tasks that you are undertaking on their behalf, in a spurious attempt to feel more authoritative and influential.
- Your client has a fragile personality and a tendency to overreact to perceived slights to their reputation, status, or position. In an attempt to remain aloof and at a distance, and therefore safe from such insults, they adopt a controlling approach towards you, relating to you as an extension of themselves and as someone who is there primarily to do their will.
- Your client finds it difficult to extend trust towards anyone with whom they are working, and this is especially the case when you, their supplier, possess a degree of technical knowledge and know-how, which they do not have. In an attempt to feel less vulnerable and professionally out of their depth your client tries to control the activities and the process by which you carry out the work you are doing for them, even though they don't have the ability to do these things well, or sometimes at all.

COUNTER-PRODUCTIVE STRATEGIES

The problem with all of these controlling strategies is that they are counter-productive strategies to use. Rarely, if ever, will adopting a controlling approach to their relationship with you help your client feel less vulnerable, less afraid, less powerless, more secure, or more influential. If the primary issue is intra-personal to your client, then attempting to control something outside of themselves – like the process of your work or you – won't do it.

Coping strategies such as these simply do not work. But some clients blind themselves to this basic flaw in their thinking and use these tactics anyway. And the result is often that they add to the complexity in their own working life, rather than diminishing it, and never so much so as when they try and control their suppliers. Clients who are overly controlling towards their suppliers often create the very circumstances that, whether they recognize it or not, result in more work and more stress for them, not less. Clients who attempt to control their suppliers' activity can directly cause:

- Unnecessary meetings.
- Repeated work.
- Sapped energy.
- Tarnished reputations.
- Poor project outcomes.
- Reduced influence.
- Unresolved wrangles and tussles around the interconnected issues of involvement, trust, and boundaries.
- Suppliers leaving them out of decision-making and problem-solving loops rather than having to battle it out with them by including them in the relevant meetings.

So if many of the outcomes for clients of them using controlling behavior are less than favorable, what motivates a client to adopt such an approach? Let's continue our exploration of the psyche of a controlling client by considering some scenarios.

EXAMPLES OF CLIENTS WITH A HIGH NEED TO CONTROL

Consider the following two scenarios.

Scenario one

An operations manager in a food manufacturer fears being exposed as a poor performer during a performance evaluation being conducted for her by her colleague from HR. Usually an open and constructive member of the workforce, the operations manager adopts a controlling approach to the evaluation feedback meeting and doesn't engage with the process in any meaningful way. She frequently interrupts the HR adviser who is there to support her and provide her with feedback, regularly asking her pointed questions. When asked for input by her HR colleague, the operations manager gives a series of uninformative, short, factual replies which are ultimately not useful in taking the meeting anywhere new, and which do not address the points put to her. She scans sections of the evaluation report, which the HR adviser asks her to read, but doesn't digest the material she glances at and remains passive, aloof, and disengaged from the process of the meeting throughout.

Her HR colleague is a conscientious and hard working member of the workforce. She is nonplussed at the attitude taken by her colleague from operations. She quickly becomes concerned that, with this minimal level of engagement from her, she will be unable to fulfill her obligations to her employer, whom she considers to be her internal client. She is also concerned that she will be unable to offer best value to the operations manager herself, whom she would like to help perform to a higher standard. She makes a mental note to discuss the operations manager's apparent lack of interest in the evaluation feedback meeting with her own manager after the meeting, before deciding what further action, if any, to take.

Scenario two

A retail banker who usually works in a lone role is a status-conscious and controlling character. His controlling traits are relatively well hidden because he rarely works closely with others. When he is asked to work with a team of temporary administrators for up to two weeks to clear a backlog of paperwork, his lack of people-handling skills quickly becomes a problem. He adopts a directive and punitive approach to the administrative suppliers, bossing them about, ordering them to comply with his wishes, and

using a hard and unyielding tone to convey to them that he wishes them to submit to his will. He makes no attempt to work with the pool of suppliers in collaborative or open and transparent ways, and his relationships with the administrators are characterized by constant tension between them and him, and unspoken anger on their part. The suppliers achieve far less in a day working for the retail banker than for any of their other clients, and two of them take unexpected time off, so annoyed are they at having to work for such an unreasonable client. The work proceeds slowly.

INTERNAL CHARACTERISTICS OF CONTROLLING CLIENTS

Let's take a look at what is going on in the minds of the central characters in these scenarios that could account for their controlling behavior.

Scenario one

The operations manager's need to control the process of the meeting with her HR colleague is driven by her fear that her evaluation feedback might not be as good as she would like, and needs, it to be. Whether it is or it isn't is not the point. She *fears* that it might not be, and her fear of failure, or more accurately her fear of perceived failure, is enough to persuade her to adopt a controlling and high-handed stance towards her colleague from HR.

The situation is complicated by the fact that her HR colleague does not regard the operations manager as her ultimate client. In the mind of the HR adviser, the operations manager is the recipient of the service she provides for her internal client, which she regards as being the organization that employs her. In her view, her client is her employer, and it is on behalf of that client that she is conducting her current round of performance evaluation meetings, each of which is aimed at improving the performance of a key member of staff.

However, the operations manager does not recognize this distinction, and decides to adopt an aloof and resistant approach to the meeting in the hope that, should she be marked down on the evaluation, she will nonetheless be able to use her position as

‘internal client’ to deflect attention away from her performance failings and simply get through the meeting. She fails to factor into her thinking the reality that her HR colleague is a dedicated and determined professional who wants her to hear the feedback she has prepared for her. The operations manager’s attempt to control the meeting is driven by her fears, and the tactics she uses are partly about what she doesn’t say or do, and partly about what she does say and do. She is unapproachable, remote, and as non-verbal as she can manage in a meeting between her and one other person. She keeps her verbal input in the meeting as short as short can be, regularly interrupting her colleague with pointed questions, and she fails to engage with the issues put to her at any stage of the dialogue between the two of them. She remains disengaged from the process of the meeting, the feedback itself, and her colleague at every turn. This controlling manager creates a situation in which her biggest professional fear – that she is not performing to standard – cannot easily be discussed during the meeting. Unfortunately for her, her strategy backfires. She never gets the feedback that she is in fact doing a reasonably good job. Worse still, she misses out on the opportunity to hear positive feedback on several effective aspects of her performance, and also doesn’t hear a number of suggestions designed to help her improve in areas where her performance could be better. She fails to digest the feedback she needs to hear, and so loses the opportunity to learn how to perform more effectively in her role. This is not a good place for her to be because it creates a situation that *could* result in her employers getting fed up with her should she fail to address her areas for development by the time of her next evaluation. In this case they *would* want to feed back to her that her performance is below par, at least in some areas, and her worse fear, that she might fail at her key performance indicators, which she could have prevented from occurring had she taken the feedback on board, could yet come true.

Scenario two

The retail banker is at once poor with people and enamored with – as he sees it – his own status and position. Fortunately for him and his colleagues, he usually works in a solitary role. Working alone suits him well. Working with others does not. Nonetheless,

he is asked to work for a period of up to two weeks with a team of temporary administrative suppliers. He interprets the disparity, as he sees it, between their relative positions in the bank as an opportunity to let his controlling nature guide his behavior. He quickly sets about driving the temps hard, employing an authoritarian and directive style with them, and using fear to get them to submit to his will.

This combination of traits and behaviors comes from a highly controlling mindset in the retail banker. He feels powerless to establish the kinds of easy and effective working relationships that his colleagues seem to do with so little effort. And he feels keenly the disparity between their unconscious facility with people, and his own rigid and awkward approach. His instinctive reaction to his new pool of suppliers is characterized by suspicion: suspicion that they will underperform for him, suspicion that they will disrespect him, suspicion that they won't like him or want to work with him. Instead of owning his fears he throws them off onto the suppliers, and without even realizing he is doing so, regards *them* with dislike, mistrust, and suspicion. He makes it his business to ensure that they do exactly what he says to the letter, and he determines to give them no room for maneuver at all.

In taking this approach, he fails to consider whether or not this is an effective way of handling things. He never even asks himself the question. He reduces his suppliers to extensions of himself; demands compliance from them and so *does* lose their respect, trust, effort, and creativity. His office quickly becomes an uncomfortable place to work. And for the entire two-week period that they have to work together, the controlling manager's approach directly precludes his team of suppliers from giving anything like their best to their work for him. Instead most of their energy goes to handling the significant degree of anger they experience at being spoken to in such a dictatorial and severe manner by their client, and to finding ways of slowing down the work or taking time off to avoid having to do it at all.

CONTROL: AN INTERNALLY DERIVED CHOICE

Both of these clients employ controlling behaviors during times of heightened tension in their working lives. Each client's decision to control is internally derived, and is mainly about something

intra-personal to them. In the two scenarios above, neither client:

- Steps back.
- Takes an objective view of the situation.
- Selects behavior to help them make an effective contribution to the resolution of the issues they are facing, a contribution which would result in them adding value to their work on behalf of their employer.

Instead, their behavior is driven by an internally derived wish to control their relationship with their suppliers, whether or not that approach is effective for their employer, because of:

- The operations manager's fears and anxieties around the possibility of failure.
- The banker's status consciousness and lack of skill at handling people.

In neither of the two scenarios above does the client consider their approach to be 'a choice.' For both of them it seems instinctive and natural to behave like this at a point of heightened tension in their working lives. But their desire to control most certainly is a choice, and one that each client allows to take precedence over every other set of considerations as they handle their suppliers.

So, had they decided to handle these situations in a different and non-controlling way, how might they have proceeded?

A NON-CONTROLLING ALTERNATIVE

Let's take a closer look at each of these clients' internally derived choice to control by comparing their behavior with that of a non-controlling client character in an identical situation. In each case the non-controlling client still experiences the situation as discomfiting, but crucially, is prepared despite their uneasiness to invest time and effort in handling the circumstances productively for their employer.

A different operations manager, finding herself in the same performance evaluation meeting as the fearful food manufacturer described above, decides that, however challenging and stressful it might be, she will put aside her anxieties about the impending

feedback and listen to her colleague from HR. She doesn't interrupt her HR adviser when she speaks, but hears her out. She considers the feedback which she is given, asks questions to clarify the points she doesn't understand or agree with, and makes a series of decisions about what aspects of the material to take on board, and which to disregard and why. She remains worried throughout the entire meeting, waiting for an unexpected piece of bad news, but she remains engaged with the process, trying to take value from the feedback and add value to the process of the meeting. She is tense throughout the meeting, which she experiences as a strain all the way through.

A different status-conscious retail banker, finding himself charged with working with a pool of temporary administrative suppliers for a two-week period, recognizes that he lacks effective people-handling skills. He understands that this project takes him well outside his comfort zone, and that he could mishandle the moment if he doesn't act carefully. Indeed, he recognizes that he doesn't even like people that much, and has a strong preference for working in a solitary role. When he is asked to work with the administrative suppliers, he determines to try to work well with them, keeping his preference for using dominating behavior out of his dealings with them as much as possible. So he adopts an approach characterized by outlining what tasks need to be done, asking the suppliers how they would like to approach the work, listening to their ideas about potential ways forward, deciding which to adopt, communicating his preferences, and letting them get on with it.

This all takes considerable effort on his part, and he remains uncomfortable working with the suppliers throughout the two-week period. The banker decides that he needs to organize his day to include breaks from interacting with his temporary team. These tactics work, and they do get through the work relatively straightforwardly, albeit he is unusually tired at the end of the day because of the strain of having to use so much adapted behavior. He is relieved when his suppliers' work is complete and he can go back to working largely alone, but he gets through the project without upsetting himself or the temps too much, and the work is done to standard and on time.

So if a client's need to control is primarily their way of handling an issue intra-personal to them, and that need to control is actually

a choice, the good news is that your client could just as easily be influenced to make a different choice, a less controlling or even a non-controlling choice, should they want to. In which case, your job when working with a controlling client is to manage the boundaries of your dialogue with them such that they:

- Become comfortable enough to relinquish some degree of control to you.
- Extend a corresponding degree of latitude to you as well.

The remainder of this chapter will describe a selection of behavioral tools that you could use to help you achieve these dual aims. It begins by exploring the interconnected issues of involvement, trust, and boundary management as they affect a controlling client's mindset. It then examines ways in which you could manage your dialogue with your client so you take their preferences across these three issues into account, before going on to explore a number of other effective skills and strategies which will enable you to work well with a controlling client.

INVOLVEMENT, TRUST, AND BOUNDARY MANAGEMENT

When working with any client, but particularly when working with a controlling client, the issues of involvement, trust, and boundary management go hand in hand. Clients who:

- Have trouble relinquishing control on a project often do so because their need to be involved in the process of the work is not being met sufficiently effectively.
- Enjoy fuller, deeper, and more frequent involvement in the process of a project often respond by using a less controlling approach because they have sufficient opportunities to influence the process of the work, to understand what you are doing on their behalf, and to find a level of comfort with you.
- Are discomfited by your – as they see it – unilateral or independent decision making or problem solving on a project may counter by withdrawing a degree of latitude from you and adopting a more controlling approach from that point onwards.
- Are comfortable with when and how you involve them in

decision-making and problem-solving processes on a project will be unlikely to experience your handling of the project as undermining of their own authority, or as your extending your authority into unwelcome territory, and therefore may well adopt a less controlling rather than a more controlling approach towards you and your work.

When working with a controlling client you need to be making allowances for the fact that, no matter how annoying it may be to you, your client has a higher than average need for involvement and a lower than average capacity to extend trust to you – and they still need you to carry out the duties they have engaged you to perform on their behalf, albeit taking these irregular parameters into account. Your job in managing the relationship with your client therefore needs to include you:

- Respecting their need to control.
- Taking their higher than average need to be involved into account in how you manage the project.
- Handling the project in a way that meets their needs rather than yours, where the two sets of concerns are different.

In some cases this may simply mean that you need to schedule more frequent status update meetings so you can involve your client, inform them about progress on the project, and solicit their opinion on key issues. But in other cases, it will mean that you need to take additional steps as well, steps which might include:

- Asking your client at the start of the project what level of involvement they want from that point onwards, and over which issues, so that they feel sufficiently involved and informed about progress on the project.
- Involving them adequately on all of these occasions.
- Recognizing that, although you have been engaged to carry out certain tasks, tasks for which you have suitable qualifications and experience, you still need to earn your client's trust throughout the *entire cycle of the project*.
- Asking your client at the start of the project where they want to place the boundaries around your authority and, if you want to renegotiate any of these boundaries at any point, doing so

in advance of the relevant decision-making or problem-solving processes.

These are simple but powerful strategies for managing the interconnected issues of involvement, trust, and boundary management. Employing them will mean that you need to do some planning and pre-thinking, but they are straightforward enough steps to implement. The benefit of using them is that they signal to your client that you want to work in ways which make sense to them, and that you take seriously your commitment to handling the project in a way which is comfortable and effective from their point of view.

Getting these simple things right from the start of a project can, in and of itself, cause some controlling clients to relent and extend some degree of latitude to you. It can obviate some of the discomfort you will otherwise experience should your controlling client react unhelpfully to your – as they see it – failure to involve and include them sufficiently deeply in a project, and as a consequence, start to employ more controlling rather than less controlling behavior.

However, some controlling clients will not be satisfied with these strategies alone. To work effectively with these highly controlling clients you will need to select and employ additional skills and strategies, ones designed with the truly controlling client in mind. So, let's now introduce a new scenario, one that illustrates the tactics used by an excessively controlling and competitive CEO in an accountancy firm. We will then go on to explore how to employ behavior that will give you the best chance of establishing and maintaining a productive working relationship with a highly controlling client, no matter what the nature of the pressures they create for you.

DIFFICULTY WITH TRUST: AN EXAMPLE OF CONTROLLING BEHAVIOR

Consider the following scenario:

The CEO of an accountancy firm has trouble extending trust to anyone whose input might prove more valuable to the company than his own, a stance he maintains with employees and suppliers alike. Nonetheless, he decides to hire a marketing consultant

to help him promote the firm more effectively. The CEO is a complicated character. As he sees it, he needs to be in control of every situation and event at work simply because he is the boss, and he maintains this view even if he has no obvious skills or knowledge to bring to a particular discussion. This approach results in him competing with the marketing consultant at every stage of the project. Whenever the marketing consultant meets with him to advise him or to outline his plans or proposals, the CEO leaves a period of silence in which he is apparently ‘listening’ before he talks at length. During these monologues he outlines a series of petty but lengthy counter-arguments to each of the suggestions put to him by the marketing consultant. In this way the CEO regularly fails to take on board any of the consultant’s ideas. The marketing consultant thinks that the CEO is wasting his company’s money and should not have hired him in the first place. Nevertheless, his professionalism drives him to invest hours in meetings with his client trying to convince him to accept the benefits of his advice, and cease trying to retain control of every aspect of the project, especially aspects in which he has no obvious competence.

In this scenario a controlling and competitive CEO hires a marketing consultant to advise him and then employs a battery of controlling behaviors which result in him disregarding the consultant’s input at every turn. We will now examine the intra-personal world of the CEO to understand what factors underpin his controlling, untrusting behavior towards his supplier. We will do this preparatory to identifying what steps the marketing consultant could take to help him handle his complicated client more effectively.

CONTROLLING, UNTRUSTING BEHAVIOR: INTRA-PERSONAL FACTORS

The CEO of the accountancy firm is a haughty and brittle character. He thinks he needs to be in control of situations and events at work because he is the boss. And he maintains this view even if he has no obvious skills or knowledge to bring to a discussion. In his mind there is a clear connection between his remaining – as he sees it – in control of the process of a piece of work or in charge of a discussion about key workplace issues, and his feeling

first, that he is doing his job, and second, that he carries little or no reputational risk. His reputation is something that he prizes highly, and as the CEO of the firm, he has a heightened sensitivity about anything that might suggest that he is less than 'on top of' what is happening in and around the firm.

His decision to hire a marketing consultant is one he takes after considerable thought. It is not easy for him to ask for help or to trust an expert to advise him. And it is certainly not at all easy for him to admit that he needs help marketing his firm, which is an activity central to the firm's ability to generate and sustain business, and one he needs to remain 'on top of'. He hires the marketing consultant but does so with a large number of invisible strings attached to the hire, strings of which the unsuspecting consultant is unaware. These strings include a requirement that the consultant act at all times with the utmost deference, respect, and regard for the skills, reputation, and opinions of the CEO, even when the CEO does not have anything valuable or even helpful to offer to a conversation.

It is almost inevitable that, with expectations as unrealistic and as unspoken as these, the marketing consultant, a man who simply wants to do a professional job, will fall foul of the CEO. And when he does, the CEO becomes impossible to deal with. His mistrust is triggered, he starts to perceive a slight to his status and position where none is intended, and he becomes ultra-controlling. His need to control is so strong that he literally continues to spend his firm's money on the marketing consultant's fees while simultaneously failing to listen to him or take on board anything he says.

The CEO competes with his supplier for air time. He talks at him. He blocks every one of his ideas, in a series of lengthy monologues, even while paying for him to generate those ideas. All this is a misguided attempt to re-establish his sense of inner equilibrium, which was upset by an inadvertent misstep taken by the consultant. In fact the CEO's verbal dexterity is such that he expends considerable energy creating and articulating a series of counter-proposals to the ideas presented to him by the marketing consultant, at once trying the consultant's patience and placing him in a dilemma. Does the marketing consultant decide to take a back seat, accept that his firm will be paid anyway, and let the CEO hold sway? Or does he decide to engage with his client's controlling and domineering behavior,

contend with his counter-arguments, and try, despite the obvious difficulties, to prevent him from rejecting advice which he needs to hear?

The marketing consultant goes down the second route, and with great doggedness and resolve, he invests heavily in his relationship with the CEO. However, if he doesn't have an effective toolkit for handling such a client, or some understanding of the dynamics with which he is faced, it could be quite a slog, more akin to a tussle of wills than any more usual client-supplier dialogue.

CLIENT SENSITIVITY AND BLINDNESS: MANAGING UNSPOKEN EXPECTATIONS

The degree of sensitivity demonstrated by the CEO of the accountancy firm towards perceived slights to his self-esteem, or perceived injuries to his level of status or power, might be unusual. But the dynamics – that some controlling behavior is driven by a lack of self-esteem, an inability to trust, and highly sensitive boundaries on the part of the client – are not. This client has unspoken expectations about the way in which his supplier ought to treat him, and he is quite prepared to become awkward should his supplier inadvertently step over the line. When this cut-off point is reached, his conduct changes, and he becomes more difficult to deal with. He becomes less trusting and correspondingly more controlling. In reality, however, the CEO doesn't gain much by using a controlling approach. In fact, he wastes:

- His firm's income on fees for a marketing consultant whose sound advice he then ignores.
- His own time engaging in futile, petty arguments with the consultant every time he meets him.
- The opportunity he has to learn from the consultant, something that would result in his becoming more effective at marketing his firm, and gain him the opportunity to make additional fee income from taking on additional work.

So how could the marketing consultant have handled this challenging client so that he didn't fall foul of his highly sensitive nature, but still managed to convey his ideas to him? There are a number of behavioral adjustments which the marketing consultant

could have made to his handling of this client. Had he used them, they could have resulted in his client being more inclined to hear him, and less inclined to misinterpret him.

The first decision that the marketing consultant needs to make is whether or not he can find the levels of humility he needs to work effectively with this client. Assuming that he can, he then needs to recognize that for a bit of effort on his part in employing a modest approach, he is likely to gain a lot in terms of client loyalty, productive meetings, and much saved time, effort, and frustration, as he avoids the kinds of adversarial exchanges which might otherwise characterize his meetings with this CEO. Here is a selection of the behavioral adjustments he could usefully employ.

- Early on in his dealings with the CEO, the marketing consultant needs to recognize his client's reactions for what they are: the reactions of an overly sensitive soul who needs help but finds it hard to accept it, who is prone to mishearing well-intentioned proposals as undermining challenges, and who needs an unusually responsive approach from his supplier if he is to remain on an even keel and therefore be a reasonable person to deal with. The marketing consultant needs to use a low-key, understated tone throughout his meetings with the CEO, and keep his delivery style as unemotional and sober as possible. This inconspicuous delivery style is crucial. It reduces the likelihood that this client will feel slighted by him and overwhelmed by his own subsequent emotional reactions, or over-react to his passion and feel the need to compete with him, factors which result in his delivering monologues and failing to listen.
- The consultant needs to frame each of his suggestions as just that. He could preface each of them by saying: 'I have a proposal for you to consider. I'd like to outline what the proposal is and why I think it would be of benefit to you and the firm. Then I'd like to hear your reaction to it along with what issues it raises for you, so I can take them on board and work with you to find a way forward which is most beneficial and advantageous for you.' Spelling it out like this makes it clear to the CEO that the marketing consultant has ideas he rates and wants to speak with his client about. It also makes it clear that the marketing consultant welcomes whatever reaction the CEO gives to his proposal, but does not expect to have to defend his proposals

or argue about them. Instead he wants to amend them and develop them in a collaborative process with the CEO, to make them as suitable as possible for the CEO's purposes. This approach subtly presupposes that the CEO wants to make a constructive contribution to the meeting, and challenges him to do just that. It puts the CEO into a double bind: simultaneously challenging him to hear the marketing consultant's proposals as positive and beneficial, while also implying that because he must want the best for his firm, he will be prepared to work constructively with the marketing consultant.

- Whenever the CEO interrupts, and he is likely to do so, the consultant needs to let him finish what he is saying and then reflect back to him, in the same sober and low-key style of delivery, what he has heard him to say. Then, taking each of the CEO's points one at a time, the marketing manager needs to respond, pointing out, for instance, how his proposals already address the CEO's concerns, or what he could additionally do to make sure that they do. This way of explicitly tying his rejoinders into specific objections which the CEO articulates will meet the CEO's higher than average need to be heard and responded to, respected, and shown deference to. This approach will obviate some of the CEO's more extreme competitive behaviors, ones that he is likely to employ on occasions when he feels disrespected, however unintentionally the consultant slights him.
- Finally, at all times, the consultant needs to avoid directly contradicting the CEO even when he is in the wrong. Should the CEO say something with which the consultant disagrees and he wants to come back to him on it, the consultant needs to do so by asking, 'Are you open to another view on that?' or by saying 'There are some things in there that I'd like to come back to you on. Can I do that now?' This way of asking for permission to disagree is more likely to gain the positive interest of the CEO than a flat delivery of the opposing view without the soft set-up. Why? Because it will circumvent the rebellious, oppositional streak in the CEO, the one that results in his competing inappropriately with the marketing consultant. And because the CEO is apt to misinterpret any contradiction to his point of view as an attempt to undermine him, framing a contradiction or a disagreement in this way means

that even he couldn't mishear the intention of the marketing consultant as wanting to do anything other than work towards his client's best interests. It makes it much more likely that the CEO will be able to hear advice which he needs to hear, and which he has paid the consultant to convey to him.

THE HIGH PRICE OF CONTROL

Whenever a client like the CEO employs a controlling approach they risk:

- Making life more difficult for themselves than it need otherwise be.
- Missing opportunities to listen and learn.
- Creating antagonism in their working relationships.
- Wasting their organization's money on advice they disregard.
- Reducing the effectiveness of the work their suppliers are doing for them.
- Getting in the way of the process of that work.

However, whatever the consequences for their own organizations or their own working relationships, your interest in a controlling client's conduct need extend only as far as the implications for you and the quality of the work you are able to do on the project. Your central task when working with a controlling client is to select and use an approach that results in you:

- Finding ways of keeping your dialogue with your client open and productive despite the challenges of their approach.
- Enabling you to produce work of a consistently high standard despite the provocation.

In the main – and with clients whose need to control is negotiable – you will find ways to work it out between you. But some clients won't be willing to relinquish control easily, even when you engage with them along the lines suggested above. These clients will continue to find it difficult to relinquish control, and will continue to handle you in a way which reflects their higher than average need to control. In these circumstances, the dynamic between the two of you can become one characterized by a constant tussle between

you over who controls what and when. And the key to altering this dynamic is working in ways that earn and keep your client's trust. We will take a look at what additional methods you might employ to achieve these aims in the remainder of the chapter.

YOUR CHALLENGING CLIENTS

You might now like to apply the material from the chapter so far to your own challenging clients. Identify a client who you think uses controlling behavior in their dealings with you. Bring a specific situation to mind and then answer the following questions about it. You can jot down your answers to each of the questions in the space below it.

- Who is your client and what is the situation you have in mind?

- What did your client say or do that you consider to be controlling?

- What impact did this behavior have on you and the process of your work for your client?

- What factors do you think prompted their use of this approach?

- What other insights are you developing about this client?

We will return to this client situation towards the end of the chapter so that you can apply the material from the next portion of the chapter to it. But let's now return to our developing theme of effective tactics and strategies you could employ if you are to work as productively as possible with a highly controlling client.

THE CHALLENGE OF WORKING WITH A CONTROLLING CLIENT

Whatever the rights and wrongs of their behavior, and whatever the challenging consequences they create for themselves, as the supplier to a highly controlling client you need to find viable and effective ways of working with them. Otherwise you risk losing business or taking a reputational hit, or both.

The challenge for you is to find effective ways of handling your client's controlling behavior so that you can bring your project to a timely and satisfactory conclusion without having to invest huge amounts of effort and energy in handling your customer, and so that you can avoid the upset you will feel should your client's controlling manner impede your ability to carry out your role to the standard you would like.

Let's explore how you might go about achieving these aims in a longer scenario. The following case study is set in a global reinsurance firm. It features a controlling head of risk management clashing with her internal supplier, a hard-working recruitment adviser from human resources, whose job involves finding a new deputy head to work alongside her. The themes of the case study are just as applicable to a relationship between an external supplier and her client as they are to the relationship between two colleagues who work for the same organization. The case study focuses on the interconnected issues of trust, involvement, authority, and control as they are played out between the head of risk management and her internal recruitment supplier from HR. It highlights the pitfalls associated with trying to control a controlling client, and illustrates a more productive and effective path to take.

CASE STUDY 2: CONTROLLING TEMPER

The head of risk management has worked for the firm for two years. Initially recruited to help turn around an under-performing group, her long hours and driven style, coupled with her results-oriented and highly focused management of the group, have produced more than the executive team had hoped for. But her success has come at a price, a price created by her controlling style of handling her colleagues.

Staff turnover in her group is higher than in any other group in the firm, and has been since the third day of her employment, when two people resigned. However, the head of risk management is unconcerned at this trend, which she thinks 'goes with the territory.' To her mind, she was recruited to transform an under-performing team into a top-performing team, and having done so, she doesn't worry that a proportion of her team continues to leave. Indeed, she thinks it is a sign that 'dead wood drifts,' and is indifferent to the constant change, discontinuity, and occasional upheaval caused by a steady flow of people out of and into the department. As long as the group continues to hit its targets she is satisfied. And it does continue to hit its targets, on both a monthly and a quarterly basis.

After two years of continually seeking replacement staff for the risk group, the recruitment adviser charged with finding

alternative members of staff takes a different view. The head of risk management is one of her key clients. In a small recruitment market where reputation matters, she finds it increasingly difficult to persuade potential applicants for the role that it would be in their interests to work alongside the controlling head of risk management. The recruitment adviser forms the not unreasonable view that it is the style of the head of risk management that is causing well-qualified potential candidates to baulk at joining the firm.

The unhelpful reputation of the head of risk management centers on her controlling style of managing her group and handling her colleagues. Her reputation includes a quick temper, significant impatience with what she regards as 'lack of progress,' and a willingness to rush to a judgment about the causes of lack of momentum, most of which she readily puts down to either tardiness or lack of application and endeavor. While it is undoubtedly true that her work ethic and driven characteristics have helped to turn around an under-performing group, it is also true that they have become a direct cause of the widespread reluctance among candidates to consider applying for a position in the department. And this is never more so than in connection with the current unfilled post of deputy head of risk management, a role which has been empty for eight weeks following the resignation of the previous incumbent after only six months employment.

At present, the recruitment adviser is struggling to find anyone suitable to interview or to introduce to the controlling head of department. She cannot find a way to sell the benefits of the role to any of the small number of potential candidates put to her by the search firm she works with. All three current candidates have the depth of experience needed to fulfill the requirements of the role technically, but none of them wants to interview for the post.

The head of risk management becomes increasingly annoyed that her recruitment colleague has not put a single CV to her, let alone found a replacement for her number two, after eight weeks of searching. She leaves a peremptory and rude message on her colleague's voicemail system, demanding that she attend a meeting in her office as soon as she picks up her communication to explain the delay. There are a number of ways in which the recruitment adviser could handle this situation. Let's explore three of them.

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- When she returns to her desk the recruitment adviser picks up the message from the head of risk management. On hearing the tone of it, and its evident disregard for the very real recruitment issues which the head of risk's controlling style have created in the first place, the recruitment adviser becomes annoyed. Fed up of having to sell a role to reluctant but well-qualified potential candidates, she picks up the phone and calls her internal client. She leaves a message on her voice system in return, telling her that she does not respond to commands and that she is working hard to fill the vacant post.
 - When she returns to her desk the recruitment adviser picks up the message from the head of risk management. She listens to it, digests it, and decides to ignore it. She sends her internal client an email saying that 'there are certain issues with the hire in a steady market' and informs her that she 'will have a series of profiles for review by the end of the week.'
 - When she returns to her desk the recruitment adviser picks up the message from the head of risk management. She listens to it and decides that it is time to arrange a meeting with her client in her office. She calls her PA and asks for the next ten-minute slot in her diary, preferably that afternoon. Her PA struggles to find an opening, but on being informed that it is about the recruitment of the new departmental number two, finds a suitable opportunity. The recruitment adviser then calls her own boss and informs him of what she is about to do. She starts the meeting with her client using an engaging and open tone. She is not at all confrontational in her manner, but instead is clear and assertive. She says that she is encountering a specific issue with regard to the latest hire, an issue that is hampering her ability to recruit a suitable deputy for the department. She says that she is having a hard time selling the benefits of working alongside the head of risk management to any of the candidates whose profiles she has looked at, each of whom is technically qualified to carry out the role effectively, but none of whom wants to be considered for the position. She leaves a slight pause before continuing to say that the lack of interest in the role is connected with the style of the head of risk management, and that she would like an opportunity to speak with her about the issues.

CONTROLLING TEMPER: ANALYZING THE DYNAMICS

In this case study the recruitment adviser has to handle her relationship with an unusually controlling client and the fallout which her client's style causes in the recruitment market, something which the head of risk management is apparently either blind to or blithe about. Let's take a look at what happens in the three scenarios.

The first instance

The recruitment adviser is annoyed at the peremptory and controlling tone of the voice message she picks up from her client. She is fed up with the issues that her client's controlling behavior and unfavorable reputation have created for her in the recruitment market. And she is doubly irritated that the head of risk management should choose this moment to turn her domineering persona on her and suggest that she isn't applying herself effectively enough to her latest recruitment challenge. She decides to play it straight back to the head of risk management and treat her like for like, while also making it clear that she is working hard and doesn't like the insinuation that she isn't. She picks up the telephone and leaves a sharp response on her internal client's voice message system, one that says that she doesn't respond to commands and is working flat out.

While we can sympathize with the sentiment behind her actions, the recruitment adviser really doesn't do herself any favors by handling this situation, however provoking, in this way. Her actions serve only to stoke the fires. Her conduct comes from her emotional response to being treated in a high-handed manner by her client. But it does not address the issues that are uppermost in her client's mind, issues which, to her client, are so pressing that she feels the need to leave an unfortunate message on her internal supplier's voice message system.

These issues concern the fact that the head of risk management needs a number two in her department, hasn't had one for eight weeks, and doesn't know what is being done to find one. The head of risk management feels out of the loop, with little or no influence in the recruitment process. She has to do something very stressful

for her: wait while someone else does something vital on her behalf, while having insufficient feedback about the process to understand where it has got to or what is being done to create progress. Without this information, and indeed a degree of reassurance, the head of risk management starts to view the situation as one in which her needs are not being attended to. She believes they are not being given sufficient priority by her recruitment supplier, and she reacts in the only way she knows how. She pushes. Hard.

Blind to the counter-productive impact this approach has on any of her working relationships, and feeling fully justified in taking this course of action, the head of risk management leaves a rude message for her recruitment colleague, a message that alienates her hard-working supplier. The head of risk believes, wrongly, that taking this line will create momentum, but actually it doesn't have any impact on the recruitment process. It simply annoys her colleague, who retaliates with a voice message of her own which doesn't give any details about where she has got to with the recruitment process, doesn't explain what the next steps are, and doesn't manage the head of risk management's expectations about what will happen next. This message is an attempt by the recruitment adviser to block the head of risk management's involvement in the recruitment process and keep her out of the way. But it's a poor choice of tactic, and it backfires on her.

On hearing the snippy message from her internal supplier, the head of risk management sees red. She calls the head of human resources to complain about the 'lack of imagination and grit' being demonstrated by her team member, before picking up the telephone and speaking to the recruitment adviser herself. During this call she tells her that she needs to see four CVs on her desk by 8.30 the following morning, and that she will take it from that point onwards. The supplier's relationship with her internal client has quickly reached a point of potential breakdown, and she will now have to work quite hard to repair the damage done to her reputation with her client and her boss as well.

The second instance

The recruitment adviser picks up the voice message from her internal client, and after having digested its contents, decides to ignore it. She simply doesn't want to take on her irascible and

controlling colleague, and decides to handle her via email from that point onwards. She sends her a brief email response in which she tells her some of the truth but not all of it. Her email says that ‘there are certain issues with the hire in a steady market,’ and informs her client that she ‘will have a series of profiles for review by the end of the week,’ a promise which she cannot know for sure that she will be able to fulfill, but which she hopes will keep her client off her back for a while.

Again, while we can sympathize with the recruitment adviser’s decision to create some distance between herself and her increasingly taxing client, she does not help her cause in the longer term or demonstrate any skill in managing her client. By reducing the communication between them to email only, the recruitment adviser does not create space for herself as she hoped to do. Rather she sends the message to her client that she and her pressing concerns are being sidelined.

The head of risk management interprets the email as another signal that insufficient is being done to find a replacement deputy for her team, and she decides that enough is enough. She picks up the telephone, and in a confrontational and clipped tone, tells the recruitment adviser that she is not satisfied with the way she is handling her affairs, and that she expects more, and quickly. Then she replaces the receiver leaving the ball in her supplier’s court. Once more, the recruitment adviser is on thin ice. She now finds herself in a conflict which, if she mishandles it, will result in a breakdown in communication between her and one of her key clients, with all the reputational risks that this situation will inevitably create for her.

The third instance

The recruitment adviser listens to the message from her key client and thinks that it is a prime example of the kind of unhelpful behavior which has hampered her so much in her attempts to find a replacement deputy to work alongside the head of risk management. She considers her options, and decides that she must now go and speak with her internal client in person. In making this decision she realizes that she is taking a calculated risk, so she decides to secure her position with her own boss first. She calls him, informs him of what she is about to do, and gains his

support for her plans. She thinks that her upcoming calculated risk is one that she must take if she is to handle this situation with any integrity. She also thinks that, if she handles it skillfully enough, she could change the nature of her relationship with her client for the better, and perhaps cause her to reconsider the use of some of her more controlling behaviors.

She decides to present her client with non-judgmental feedback, not on her behavior in itself, but on *its impact on the recruitment process*. This is a key decision on her part as it *depersonalizes* what she wants to say, and makes the meeting about the *recruitment issue* rather than simply being a complaint about her client's approach to either the recent voice message she felt the need to leave, or her handling of her workplace relationships in general. The added benefit of framing things this way is that it makes an explicit link between what the head of risk management wants to happen – the speedy and effective recruitment of a deputy – and the way in which she herself has, however unknowingly, hampered the achievement of this goal. It is a tactic that makes the discussion about something close to the head of risk management's heart – the recruitment of her number two – so it ought to result in her engagement with the issues.

The recruitment adviser realizes that her tone and her style of delivery during the upcoming meeting are vital if the head of risk management is to hear what she has to say. She decides to keep her demeanor open and approachable. She doesn't want to diminish the content of her message by underplaying the impact of her client's controlling style on the recruitment marketplace, but then she doesn't want to inject any ire into her voice either, something which would turn a dispassionate discussion about resolving a business issue into a personal dispute.

Furthermore, and just as importantly, she decides that she will be prepared to have a full and frank discussion about the feedback she has received from the potential candidates who declined to interview for the position. She wants to present her client with the consequences *she is creating for herself* in consistently behaving in controlling and unreasonable ways. The recruitment adviser goes to talk to her client knowing that this conversation needs to involve and inform the head of risk management in a carefully handled way. It needs to *involve* her in the challenges surrounding the recruitment process so that she understands what the delay is

about, and what is being done to create momentum. It needs to *inform* her about how her own behavior has created the situation in which it is not straightforward for the recruitment adviser to find a replacement deputy head. And all this needs to be accomplished without causing the head of risk management either to become unduly defensive or reject the feedback and blame her for the delay.

The recruitment adviser thinks that the meeting could go one of two ways. Her client might be able to hear her or she might not. But, from her point of view, it is a meeting she needs to have if she is to avoid a situation in which she is unable, from that point onwards, to find anyone suitably qualified who is willing to work as a deputy to the controlling head of risk management.

THE PITFALLS OF TRYING TO CONTROL A CONTROLLING CLIENT

The previous case study illustrates how the temptation to cut a controlling client out of information-giving loops and to reduce their involvement in a project can backfire badly, as in the first two instances described above. On the surface, trying to control a controlling client by keeping them out of the way as much as possible may appear to be an effective tactic. It may well reduce the opportunities available to your controlling client to:

- Behave objectionably towards you.
- Sap your energy.
- Take up your time fruitlessly.

However, it is ultimately a misguided strategy to use, one that is likely to backfire on you, and one that can quickly take your relationship with your client from a place where it is workable but difficult towards a point of breakdown. It is a mistake to:

- Exclude your client from discussions.
- Fail to provide them with timely updates.
- Omit them from decision-making loops.
- Cut them out of problem-solving processes.
- Fail to elicit their timely input over decisions and situations in which you know they would prefer involvement.

These may be understandable impulses, but they do not work. They will exacerbate your client's need to control. They will not render it impotent. In fact, the more you try to control your controlling client by doing these things, the more likely it will be that your controlling client will retaliate by confronting you and seeking greater control themselves. And ultimately, your client does have more power than you in organizational terms, and can make trouble for you by:

- Sacking you or ending your involvement on the project.
- Damaging your reputation with your key contacts or colleagues.
- Making your work on the project more difficult to carry out than it need be.

Once more, they are the client and you are the supplier, and the project remains their project no matter what.

REMAINING COMMITTED TO INVOLVING YOUR CLIENT

A much better plan, as presented in the third instance in the case study, is to remain committed to working in open and transparent ways with your controlling client no matter what the provocation. Your task is to find ways of continuing to provide them with an honest and factual account of the issues you are facing, while also describing to them as non-judgmentally as possible how their conduct is hampering your work. This approach:

- Involves and informs your client, keeping communication between the two of you open.
- Preserves trust with your client at a point of heightened tension.
- Means that the two of you remain on the same side, committed to the same goal of generating high-quality outcomes on the project.
- Makes an explicit link between their conduct and its impact on the situation you are handling – something they might otherwise be blind to.
- Presents your client with a clear choice to make about their future behavior.

- Prevents you from falling into the trap of trying to control a controlling client who inevitably has greater organizational power than you.
- Makes it much more *unlikely*, not more likely, that your relationship with your client will move to a point of breakdown despite the degree of difficulty required to handle this conversation well.

The strategy of remaining committed to involving and informing your client, even if it is one which requires tenacity and effort on your part, is much more likely to bear fruit for you in both the short and long runs. Why? Because it meets your controlling client's need to:

- Know what is going on.
- Be in a position to influence key events.
- Have a say in issues which affect the progress of the project.
- Work in open and trusting relationships with their suppliers.

However, the tone you set when you speak with your client is vital, especially when things have gone wrong and your client's behavior is one of the issues you need to address. It is crucial that you keep the conversation around the *business impact* of your client's conduct, and away from complaints about the difficulties their behavior is creating for *you personally*, and it is also vital that you frame the conversation positively as an exploration of potential ways of generating or maintaining momentum on the project.

In the previous case study we explored how to remedy a situation fast moving towards relational breakdown when working with a controlling client. Let's now change tack and focus on how to construct your relationship with a controlling client along productive lines from the start of your involvement with them.

WHEN AND HOW TO INVOLVE A CONTROLLING CLIENT

The more frequently you involve a controlling client over smaller and less important issues, and the earlier and more consistently you

do so in the lifecycle of the project, the more room for maneuver you are likely to earn over larger and more important issues later on.

An ideal starting point is to ask your client at the start of a project how much involvement they would like to have in the process of the work. This sends the signal to your client that you want to work in ways which make sense to them. Thereafter, you can simply update them on what you are doing and why, keeping it, in the first instance, short and to the point. Your client will delve deeper if they want to, but in the main, they are likely to receive updates framed this way as exactly that: briefings that keep them up to date with progress rather than see them as opportunities to interfere or get in the way. It is much more likely that they will do neither of these last two things if they perceive that their underlying need for involvement is being met by you on a regular basis from the off.

THE BUSINESS BENEFITS OF INVOLVING A CONTROLLING CLIENT

Your aim in regularly updating your client in this way is not to create a situation in which your client gives you carte blanche over their affairs. Rather, it is that over time you stand a good chance of managing your relationship with your client so that you:

- Build some trust with them, however controlling they prove to be.
- Earn the right to have your point of view seriously considered by your client on a regular basis.
- Create the circumstances in which your client becomes willing to give you greater latitude as the project progresses.

Basically, the more frequently you involve your controlling client in the right way in your project, the greater will be their level of comfort with you and the work you are doing, and the more straightforward it will be for you to raise issues with them early and in a way which will be comfortable for them to address. This approach needs to center on your willingness to do certain things consistently and straightforwardly. Let's explore each of the benefits in turn.

- It will be in your best interests to plan ahead and solicit your controlling client's opinion in advance of key decisions. This does not mean that you abrogate responsibility for making the decisions you need to make. It does not mean that you let your client do your job for you. But it does mean that you respect your client's underlying need to be involved, so you plan to give them opportunities to influence the process of key events as they see fit. You still need to make decisions. You still need to communicate the rationale for your decisions to your clients and stand by the outcomes you are committed to creating for them. But you can do these things while also creating an opening for your client to have some involvement in the process, to obviate the greater discomfort you will feel should you move ahead too far, fail to consider the wishes of your client in a timely way, and end up having to handle their angry, controlling responses.
- It will be in your best interests to anticipate circumstances in which your client might benefit from a heads up and inform them of these issues in advance. This approach could simply involve the occasional short email, telephone call, or face-to-face briefing. It will structure your client's expectations about forthcoming issues. It will demonstrate to them that you are aware of the political ramifications of your work, and are thinking about the impact of that work on them and their reputation. It will represent conclusive proof to them that you are not minded to rush ahead without involving them in the key decisions and processes that affect the project.
- It will be in your best interests to adopt a style of handling your client which is always service oriented. You can't afford to come over as looking for direction or appearing unclear about what you are doing. Neither can you afford to come across as being divorced from the reality of their day-to-day working life. Rather your involvement of your client needs to be presented to them as being about meeting their need to be included at the heart of the project, and as being motivated by your respect for their position as the client because it is part of the service you are providing for them. Every contact you have with your client, on email, face to face, or over the phone, is important, and is an opportunity for you to retain influence with them, so avoiding the repercussions with which you

might otherwise have to contend should you mishandle them and fall foul of their controlling nature.

This approach should build and maintain sufficient trust between you and your client that you can proceed reasonably straightforwardly with your work. And it is vital to create and maintain some trust with a controlling client. However, having built some trust you then have to behave in ways that preserve it. Let's examine some of the issues you might face should you earn a controlling client's trust to some extent and find that your next challenge is to use the room for maneuver you have earned well.

EARNING AND KEEPING YOUR CLIENT'S TRUST

You have earned some degree of trust with your controlling client. Or, to put it more accurately, your controlling client has responded to your approach by extending some degree of trust to you. Earning your controlling client's trust is one thing. Using that room for maneuver wisely is quite another. In my view, in this situation, one in which a controlling client has extended trust to you and consequently has moved the boundary of their relationship with you to accommodate a greater degree of trust, the key thing to remember is that the project you are working on remains your client's, not yours. It would be a mistake to think that the dynamic between you has altered for all time, and that the project now belongs to you. It doesn't. Your client has paid you the compliment of agreeing to work with you in a more, rather than less, trusting way, and you need to honor that decision continually. By all means own your:

- Commitment to the work.
- Desire to apply yourself creatively to the challenges inherent in the project.
- Willingness to expend effort and time in producing top quality outcomes for your client.

But remember that it is a continuing part of your role as a supplier to behave in ways which earn you the right to enjoy the trust that has been extended to you, especially when the client extending that trust doesn't do so easily. You need to keep in mind the continuing

requirement to act in ways which preserve the trust you have been offered, and perhaps deepen it. The client remains the client, and you remain the supplier. And your client's trust is something they can:

- Continue to extend.
- Retract to some degree.
- Simply withdraw.

It's their choice.

Your job is to use the room for maneuver that your client's trust in you has earned you, and use it well. You can't afford simply to relax once you have been handed some degree of autonomy. You cannot afford to fall into the trap of taking the latitude they give you for granted. Any change of approach in this direction would be a mistake, and will be noticed by your client. You would be better off continuing to use the approach that won you a degree of latitude in the first place, an approach which will mean:

- Involving your client in key decision-making and problem-solving processes.
- Consulting them over the future direction of the work.
- Determining at what points and in what detail to inform them about progress and outcomes.

These are important points of ongoing contact for you to have with your client, and ones which will have a significant influence on your erstwhile controlling client's continued positive perception of you and your qualities as a supplier.

BECOMING TOO UNGUARDED

Some of you may be tempted to go into a different 'mode' with your controlling clients once you have earned their trust. You may mentally relax, becoming more unguarded in your dealings with your clients, and while you would be unlikely to consciously take your foot off the pedal in terms of the quality of work, you might cease to:

- Think as carefully as you did while seeking to earn your client's trust.

- Look as assiduously for opportunities to add value to your work for your client as you did before establishing some level of trust with them.
- Present your efforts in as service-oriented a way as you did prior to being given some degree of latitude and autonomy by your client.

I think that this approach, while understandable, carries a significant degree of risk with it when you are working with a controlling client. The risk is that your client notices your change of gear and forms the view that you are not as respectful of them, their position as your client, and their trust in you as you should be. They may even form the view, whether you agree with it or not, that you are coasting or taking your work with them for granted. You would be better off employing the same focused, delivery-oriented style throughout your involvement on the project, the same style which impressed your client sufficiently that they decided to extend trust to you in the first place.

However, having won the *right* to a degree of latitude, you can enjoy the *benefits* of working for a client who trusts you and lets you have some degree of freedom.

USING YOUR FREEDOM WISELY

So what are those benefits, especially when you are working with a controlling client? Basically, they reside in your ability to make sound judgments about when and how to involve your client in the process of the work. A controlling client who has extended trust to you will, by and large, be likely to leave you sufficiently in charge of the project that you can subsequently decide when and how to involve them, and over what matters. Generally you will be free to:

- Make key decisions, involving your client in the decision-making process as and when you judge it right.
- Inform your client of where the project has got to, what the next steps are, and what the future decision points are.
- Solicit their input when you need to.
- Give them a heads up when you want to.
- Respond to their requests for updates as and when they issue them.

- Explore options for the future direction of the project with them.

Working this way allows you to use the greater part of your energy in pursuit of quality outcomes for your client, safe in the knowledge that you are involving them to the degree they would like, over the issues they are likely to think critical. And if you are not sure, you can always ask whether or not they want to be involved in a particular issue, and in what way. This is a respectful question to ask, and one that provides your controlling client with choices about their involvement. And it is likely to represent exactly the kind of ongoing proof that a basically controlling nature will need that the trust they have extended to you, their supplier, is well placed, and that they and their project are in good hands.

The more you know about the factors which determine any individual client's decision to trust the better placed you will be to handle these dynamics effectively. I have written previously and in depth on the issue of control, trust, and trustworthiness at work in Chapters 10 and 12 of *Managing Politics at Work: The Essential Toolkit for Identifying and Handling Political Behaviour in the Workplace* (2009), and those of you who wish to explore these issues in more depth may like to read these chapters.

YOUR CHALLENGING CLIENTS

You may now like to apply the material from the second half of the chapter to your own working life. You might like to return to the client situation that you identified earlier in the chapter involving the client whom you think used controlling behavior in their dealings with you. Bring the same specific situation to mind and then answer the following questions about it, questions which focus on your handling of the situation and your controlling client. You can jot down your answers to each of them in the space below it.

- What strategy did you employ to handle your controlling client at the time of the incident?

extent to which they are influenced by an inner need to control, and their willingness to extend trust to you.

- Suggests that the more straightforward it is for a client to extend at least some degree of trust to you, the less likely they are to want to retain control to an unhelpful degree on a project you are managing for them.
- Illustrates how a client's need to control comes primarily from within, stemming from intra-personal factors such as a need to feel important, perceived injuries to their reputation, fears about their performance, or a basic lack of confidence and know-how with people.
- Suggests that many clients will be blind to the consequences of their controlling nature on the quality of the relationships they build with their colleagues and with you.
- Identifies how involving your client in the key aspects of the project from early on in the lifecycle of that project is a highly effective strategy for obviating some of the difficulties in working with a controlling client.
- Examines how the strategy of cutting your client out of decision-making loops and otherwise keeping your involvement with them to a minimum on a project is likely to be highly counter-productive in the short and long runs.
- Proposes that the most effective way to build and retain trust with a controlling client is to do the hard work of keeping communication with them open, full, and service-oriented at all times, especially when things get tricky between you.
- Suggests that working hard to involve your client in ways and at times which make sense to them is essential, and will reap benefits for you when working with a controlling client.
- Identifies a number of practical ways in which to earn and keep the trust of a controlling client, including respecting the boundaries that they place around your involvement in the project.
- Highlights the pitfalls of changing gear and relaxing after your client has extended some trust to you on a project.
- Explores how to preserve the trust you have built with a controlling client by continuing to involve them regularly in the process of the work, just as you did before they extended trust to you.

The next chapter focuses on the tricky issue of working with a previously reasonable client who, out of the blue, expects you to take actions that you consider to be beyond the call of duty. This client doesn't want to control the process of your work for them in itself, but does want you to do some things for them which compromise you and which place you in a position of discomfort. The chapter examines the pitfalls and challenges of working with such a manipulative client, and identifies a series of effective strategies you could employ to manage your relationship with them and keep it viable, while also making it clear where you draw the line and why.

Maintaining the Balance

Clients who Take Advantage

CHALLENGING CLIENTS

In the previous three chapters we have been considering clients who are, in the main, troublesome and uncomfortable characters to handle, people whose natural *modus operandi* includes being obstreperous, controlling, and sometimes downright awkward. These clients present a variety of challenges for you as you work with them, including unilaterally deciding not to continue to sponsor you and your work without informing you of this fact, being deliberately obstructive of the work they have engaged you to perform, and using unreasonable behavior that is both time-consuming and energy-sapping for you to contend with.

None of these clients is a straightforward character to deal with. Each presents specific behavioral challenges for you to manage as you seek to establish and then maintain an effective working relationship with them, retain their business, and safeguard your reputation. We will return to the theme of managing challenging client personalities in subsequent chapters, but for now let's turn to a different kind of challenging customer. The subject of this chapter is clients who are actually relatively undemanding people to deal with and with whom you have an established and effective working relationship. The problem is that these clients are tempted to take advantage of their cordial working relationship with you, and place you in a position where you feel professionally discomfited or compromised as a result.

STRAIGHTFORWARD CLIENTS

Some clients are straightforward and enjoyable people to deal with. They see their relationship with you in clear and uncomplicated

terms. They want you to manage a project for them. They respect your skills. They are quite comfortable with the way you handle yourself, and they let you do your job without undue interference from them. So it is easy for you to get on with managing your workload without having to worry that you are not giving them the attention they want or the frequency and depth of contact they need.

These clients will tell you if something is amiss. They are comfortable enough with themselves that they can confront issues in a simple, down-to-earth way, and they can extend trust to you as a matter of course. They are unlikely to want to terminate your work with them unless you make a major error of judgment that compromises your credibility.

PUSHING THE BOUNDARIES

However, because these clients are able to build relatively trusting and open relationships at work and have established a viable working arrangement with you, they might also be tempted to take advantage of the quality of their relationship with you and ask too much. Consider the following short scenarios.

Scenario one

A buyer for a bottled drinks manufacturer expects the glass supplier he has purchased from for over six years to provide new heat-retaining glass for his house at a much-reduced price. The glass supplier feels trapped. He doesn't want to let his client down but feels pushed into a corner. He agrees to take it to his boss. However, he has great difficulty selling the proposition to his manager, who is annoyed that he has even agreed to consider it.

Scenario two

The managing director of a steel stockholding company hires a leadership development coach who runs a small consultancy firm and with whom he has worked for ten years. He tells the coach that he expects him to provide him with a verbal debrief following each one of his coaching meetings with members of the senior management team. The MD specifies that the verbal debrief must include information on each manager's psychometric feedback.

The leadership development coach balks at this suggestion, even though he has worked with this client on and off for many years, and even though the steel stockholding company is his largest client account. He believes that giving the requested information to the MD would breach the confidentiality agreement he wants to set up with each of his coaching clients. Although he doesn't want to break confidentiality, he also doesn't want to alienate his client, and he prevaricates, unable to take a firm stand.

Scenario three

An ambitious and hard-working operations manager in a hotel chain has a close working relationship with her human resources advisor. The two women have worked together for two years, and regularly go to the gym together or for a drink after work. The operations manager thinks that her human resources colleague ought to turn a blind eye to some of the unfavorable feedback she has received as part of her yearly 360-degree evaluation process. The unfavorable feedback specifically relates to her performance over the two months leading up to the evaluation, a period of time during which she experienced illness and sleepless nights as a result of the breakup of her marriage. She believes that the negative perceptions about her performance should be 'glossed over' by her HR colleague, and that her excellent track record up until the time of the evaluation should be sufficient to make this course of action possible. Her human resources colleague takes a different view. She wants to make the negative feedback an issue for ongoing discussion between the two of them, and refuses to ignore the unfavorable comments. The two women fall out over the issue, with the operations manager particularly annoyed at what she regards as her internal supplier's 'lack of service' and 'lack of perspective' in the matter. For her part, the human resources advisor thinks that her internal client expects her to let their friendship affect her professional judgment, and is cross at being placed in what she sees as an invidious position.

COMPROMISED RELATIONSHIPS

In each of these situations a client wants their supplier to take a course of action which benefits them personally or professionally,

but which is beyond the call of duty as far as their supplier is concerned. In each case the supplier thinks that the request being made of them is one which:

- They can't easily refuse if they are to retain the goodwill and positive regard of their client.
- Puts them in an awkward position because it comes from someone whom they like and respect.
- Places them in a position where, in order to work to the agenda of their client, they need to compromise a value that they hold dear such as confidentiality or professionalism.
- Puts them on a collision course with their client (or their boss), which must inevitably result in a conflict.

Let's look at how each of the suppliers in these scenarios handles their dilemma.

Scenario one

In the first scenario, the glass supplier hears his client request reduced-price glass for his home. He decides to stall and buy himself time. He thinks that it might be worthwhile for his company to humor its client and so retain his goodwill, but also thinks his client is out of line in making this particular request. Rather than take responsibility for deciding how to handle this awkward exchange, he decides to pass the buck to his boss, and agrees to take the suggestion to him. However, his boss is distinctly unimpressed that his employee has allowed himself to be maneuvered into a corner in this way, and makes his annoyance very clear. He takes the view that it would be unwise for the company to do this 'favor' for their client, as it could set a precedent which could result in further instances of this client, or other clients he speaks to, asking for 'favors' and trying again to take advantage.

Scenario two

In the second scenario, the MD of the steel stockholding company is faced with having to make three members of the senior management team redundant. He decides to make this unpalatable task less onerous by finding out more about the personalities and characters

of his senior team members and using this information to help him decide who to let go. In this way he can subtly pass the buck over whom to let go to his leadership development coach, without the coach even knowing that he is being used in this way. The MD doesn't think through the implications of his request as far as the leadership development coach is concerned, and having made his wishes clear and heard his supplier's subsequent discomfort, he is disinclined to back down. Having boxed himself unwisely into a corner, he can't find it in himself to change his mind, and having tried unsuccessfully to persuade the prevaricating leadership development coach to 'work with him,' tells him that he is going to find someone else to carry out the psychometric assessment instead.

Scenario three

In the third scenario, the operations manager in the hotel chain hopes that her friendship with her internal supplier from human resources will enable her to ignore consistently poor 360-degree evaluation feedback during a two-month period of personal crisis in her life. Unfortunately for her, her HR colleague does not feel able to do turn a blind eye to the feedback, believing that if she takes this line she would be both failing her internal clients – her employer and the operations manager – and compromising her own integrity. The two women fall out over the issue, and while they continue to work together, it is in a more formal and less effective manner than previously. They cease going to the gym or for a drink after work, and don't socialize together again.

QUALITY OF DIALOGUE AND RELATIONSHIP

What makes all of these situations difficult for the supplier to negotiate is that it is the quality of relationship that they have established and maintained with their client which prompts each customer to approach them with their suggestion in the first place. In none of these cases is their client a particularly dissembling or duplicitous character, although some of them are clearly guilty of demonstrating poor judgment and of trying to manipulate their suppliers. Had they been consistently unpleasant characters to deal with, each of these scenarios would take on a different tone. But

in each case, the client, who is usually a straightforward person to deal with, takes advantage of the relationship they have developed with their supplier, more to get themselves out of a tight spot than to flex their power muscles, although clearly they are doing that too.

As soon as they start to think in this way, each of these clients strays into territory where they expect their supplier to act in ways which, whether they have thought it through or not, result in their supplier feeling compromised and change the nature of their relationship with them. We will return to these three scenarios at the end of the chapter to examine the range of options before each of the suppliers as they grapple with how to handle their awkward customer's request. But, before we do that, let's now explore how a supplier caught in a similar dilemma might handle the situation through a longer scenario.

CASE STUDY 3: PROFESSIONAL DILEMMA

The facilities manager of a large museum hires a specialist contractor to help him manage a series of infrastructure and buildings upgrades throughout the slightly dilapidated central museum building. He is impressed with the relaxed but professional tone set by the contractor. He enjoys working with her, and likes the way in which she manages her relationship with him as a shared process in which she shoulders a lot of the load but also makes a point of finding out about and working with his agenda. He thinks that working with her makes a refreshing change from other contractors he has worked with, who he thought didn't add much value, and who didn't invest sufficiently in building an effective relationship with him. On a couple of occasions he suggests to the contractor that they hold their meetings in a coffee shop near the museum, and during one of these occasions he discovers that the contractor is involved in a voluntary capacity in working with children with learning disabilities. He mentions that his own five-year-old son has learning difficulties, but then quickly switches the conversation back to their business agenda.

Towards the end of the next two meetings, both of which he suggests holding in the coffee shop, the facilities manager brings the conversation round to the issue of the contractor's voluntary work. He starts by telling her some of his anxieties about his son,

his frustrations about his slow progress at school, and the impact on his other two younger children when so much of his and his wife's time and energy goes to their eldest child.

On each occasion that her client takes the conversation down this route, the contractor lets him speak and listens to him without saying anything in return. She thinks that the conversation is within bounds at this stage, but is concerned that her client finds it so easy to self-disclose to her about his family issues, a series of confidences which she has not sought and feels some discomfort about. She is concerned that her working relationship with her client is moving away from a clear, productive business-centered alliance towards one where her client might want to involve her in some aspects of his relationship with his son or his home life which is something she does not necessarily want to do. It is his assumption that she is prepared to engage with him in this way that leaves her feeling discomfited. On each occasion she tries to bring the conversation back towards the building program they are there to discuss, she finds that her client digs his heels in, determined to keep to the subject of his family issues.

The next time they meet, a meeting which is again held at her client's suggestion in the coffee shop, the contractor finds that their discussion of the program of works is not uppermost in the mind of her client at all. Instead he begins the meeting by describing at length how he is trying to find a better school for his son. There are a number of ways in which the contractor could respond to this situation. Let's examine three of them.

- The contractor thinks that the facilities manager is out of line. She is annoyed at what she sees as her client taking advantage of his business relationship with her to speak with her again about issues from his private life that are irrelevant to their work together. She decides to draw a clear line, and interrupts him. She tells him that she has another meeting to go to after the current one, and would like to run through one or two points relevant to the program of works they are there to discuss. Then without waiting for an answer she gets her paperwork out of her briefcase and commences her summary of progress on the project during the past week.
- The contractor feels concerned that her client is choosing to speak with her about his son's situation, and doesn't think that

she is an appropriate person for him to confide in. However, she doesn't want to risk alienating him, so she decides to compromise. She shifts in her seat and then tells him that she would be glad to speak with him about the issues he is facing with his son, but would prefer to do so on another occasion. Then she lifts her paperwork out of her briefcase and smiles at him. She pauses to enable him to make eye contact with her, and when she is certain he is comfortable, she begins her summary of the issues surrounding the schedule of work.

- The contractor decides that her client is stepping way over the line. But she is also aware of the sensitivity of the issues he is handling at home and currently speaking with her about. Rather than interrupt him and risk embarrassing him, she decides to let him speak. She then looks for an opportunity to tell him that as she has some experience in working with children with learning difficulties, she could put him in contact with people who might be better placed than her to discuss the issues with him.

PROFESSIONAL DILEMMA: ANALYZING THE DYNAMICS

In this case study a facilities manager allows the emotion he feels about his son's learning difficulties to cloud his judgment in his relationship with the contractor whom he hires to work with him at the museum where he works. During the course of their work he finds out that she has some experience of working as a volunteer with children with learning difficulties. As she is someone he is comfortable working with, and with whom he has established an enjoyable dialogue, he starts to confide in her. He tells her some of his anxieties about his son, and describes the tensions that exist in his relationships with his other children. At first his self-disclosures are small in duration, and occur at the end of productive meetings about the program of work she is engaged with him on. However, when he starts a meeting with a lengthy description of the issues surrounding finding a more effective school for his son, the contractor feels distinctly uncomfortable. Let's take a look at what is happening in the three scenarios.

The first instance

The contractor is irritated and annoyed at her client's presumption that he can simply hijack a business meeting and start it by speaking about issues from his private life, rather than concentrate on what she is there to do: consult with him about the program of works in the museum. She decides that this time it is black and white, and decides to redress the balance. She determines to put a stop to what she sees as an escalating issue. She thinks that if she doesn't draw the line now, she risks letting the issue grow until it could compromise her work for the museum. She decides to interrupt the facilities manager. She simply speaks over him, telling him that she has another meeting to go to after her meeting with him. Then, without giving him a chance to say anything in return, she begins her summary of the issues she wants to talk through with him regarding the works.

While we can sympathize with the contractor in her view that her client has overstepped the mark, she doesn't do herself any favors in handling him in this abrupt way. First, she risks embarrassing him. The facilities manager is in the middle of speaking with her about family issues, which are difficult for him to deal with. Even if he is straining her goodwill by doing so at all, let alone at the start of a business meeting, and even though she has the right to move the meeting back onto the business issues she is there to discuss with him, doing so in this huffy way is not wise. The facilities manager feels the full force of his supplier's irritation, and is pulled up short by her somewhat peremptory change of direction. On previous occasions she has not conveyed any discomfort to him when he spoke about his family issues. He feels self-conscious and embarrassed, even slightly humiliated at her implication that his topic of conversation is inappropriate. Indeed it is, but saying so as directly as this isn't in the contractor's best interests. The facilities manager reacts by thinking that the personal trust he has placed in the contractor might have been misplaced, and he regrets speaking with her about his son and family issues. Although he allows her to complete her summary, making minimal but sufficient comments about the points she puts to him, he leaves the meeting feeling uncomfortable and looks for a way to save face.

On his return to his office he decides that she will have to work with one of his deputies from now on. He sends her an email two

days later thanking her for her work on the project and informing her that her new contact at the museum will be in touch with her shortly. While the contractor does not lose business this time round, she might find that she is not considered for business she is well qualified to do in the future should it involve working directly with the facilities manager. The contractor's somewhat high-handed management of an awkward issue in her relationship with the facilities manager has pushed her relationship with him to a place where it will be difficult for him to re-engage with her, or easily ask her to work with him on another project.

The second instance

The contractor is concerned that her client seems, as she sees it, so unsupported in his private life that he resorts to speaking with her about his son's schooling. She is surprised that he feels the need to do this, and while she sympathizes with his situation, she doesn't think that she is qualified to counsel him about the issues, something she forms the view that he wants her to do.

She decides to buy herself some time. She signals her wish to speak by shifting in her chair, and tells her client that she would be glad to talk with him about the issues he is facing with his son, but would prefer to do so on another occasion. Then she smiles, and having made sure that her client has made eye contact with her, starts her summary of the issues she wants to raise with him. On the surface, this way of parking the conversation about his family issues might appear to be a clever way of getting out of a tricky spot. It does allow her to re-focus the meeting around the business issues they are there to discuss without embarrassing the facilities manager, and it does so without telling him he is being inappropriate in speaking with her about his son's schooling.

However, handling things this way hasn't really achieved very much for the contractor. It might have brought the conversation back to the business agenda of the program of works, but it has also set up a very clear expectation in the mind of the facilities manager that a future conversation about his son *will* be forthcoming. In fact, he could be forgiven for thinking that she wants to set up a dedicated meeting to discuss his son, a situation which would suit him down to the ground, and which will obviate the need

he currently feels to usurp business meetings. But, in reality, the contractor doesn't want to have this conversation with her client at all, and by handling things this way she has set herself up for one of two unpleasant outcomes. Either her client will expect a dedicated meeting with her at which to discuss the issues in his family, a meeting she feels neither qualified to have nor enthusiastic about having, but to which she has committed herself. Or if she pulls out when he suggests organizing that meeting, she risks alienating him and having to deal with how he feels about that brush-off, with all its implications for their business dialogue. All in all, parking the issues in this way doesn't do it for the contractor, and only sets her up for another difficult conversation later on.

The third instance

The contractor is worried at the turn the conversation takes, and thinks that her client is stepping way over the line. However, she forms the view that he is weighed down with the issues surrounding his son's schooling, and because he is not handling them well, is in danger of misjudging the moment with her. She prefers to take this more lenient view as opposed to the alternative, which is to mentally charge him with willfully taking advantage of his relationship with her. She is sensitive to his position, but is also sensitive to her own position. She wants to find a way of handling this issue which clarifies the boundaries around her working relationship with her client, places responsibility for counseling him about his son's schooling with someone more suitable than herself, preserves his dignity, *and* offers him a way forward.

She lets him speak, then suggests to him that as she has some experience of working with children with learning difficulties, she could put him in touch with someone better placed than her to speak with him about the issues he is facing. This is an effective and a clever way to handle the situation, and it works well for her. Her carefully chosen words include saying that she has *some* experience of working with children with learning difficulties, but would like to put him in touch with someone *more* qualified than her. She avoids the pitfall of taking too much onto herself by offering her client advice about issues she doesn't feel qualified to handle. She avoids the risks this strategy would create for her business relationship with her client should it backfire, and she

succeeds in giving him an easy way out of an increasingly awkward series of self-disclosures.

This way of handling things also demonstrates to her client that she has noted his circumstances and is motivated to help him within certain boundaries. She tells him that she isn't going to disengage from him and leave him without assistance, but is going to help him take the next steps. She demonstrates considerable skill in handling a delicate situation so tactfully. She earns the gratitude of her client for the useful contacts she introduces him to, and manages to keep her discussion with him to the issues they are contracted to work on. All in all she handles a complicated and potentially tricky situation with a well-intentioned but troublesome client effectively, and keeps herself in the frame for any future work that the museum might need doing.

In the case study, the contractor has to decide how to handle a client who is in danger of asking her to play a role in his private life which it is not her place to play. His actions push the boundary of the relationship beyond a point that is appropriate, and cause discomfort for the contractor. Her challenge is to find a way of handling the situation so that she effectively confronts the issue – that she is not qualified to speak with him about his son's schooling – while preserving the quality of her working relationship with her client. You might now like to step back from your work and apply this material to your own working life.

YOUR CHALLENGING CLIENTS

Identify a client who you think has placed you in a position where what they asked of you was beyond the call of duty. Bring a specific situation to mind and then answer the following questions about it. You can jot down your answers to each of the questions in the space below it.

- Who is your client, and what is the situation you have in mind?

so that we can identify alternative ways in which the supplier in each scenario could have proceeded. Specifically, in each of these three scenarios let's examine how the supplier involved could have found a way of handling their client which:

- Makes it clear that their client is asking too much of them professionally and is in danger of taking advantage of their positive working relationship

While also:

- Preserving the quality of the relationship that they have with their client so that they retain their business.

In none of the three situations is this easy to accomplish. But it is possible. Let's revisit each of them in turn.

CLARIFYING THE CHOICES

Scenario one

In the first scenario a glass supplier hears his client, a bottle-manufacturing buyer, requesting reduced-price glass for his home. He decides to try to keep in his client's good books by passing off the responsibility for handling this awkward request to his boss. He hopes that stalling in this way will get him out of a tight corner with his client. But it doesn't, and it proves a costly mistake for him to make. Rather than get him out of a tight spot with his client, handling things this way creates a second difficult situation for him, this time with his boss who, just like his client, forms the view that the glass supplier has avoided responsibility for making an important decision and thinks less of him as a result. Handling things this way impairs his reputation with both his boss and his key client. What could he have done to handle the issues more effectively?

First, he needs to realize that, however limited, he does have some room for maneuver. His first decision is to determine what is more important to him as soon as his client puts him on the spot. Is it his relationship with his boss, his relationship with his client, or both? Presumably he will decide that both matter, so he needs to find a way forward which:

- Satisfies his client and retains his business.
- Presents himself as an assertive supplier who is also customer-focused.
- Avoids the need to refer a problem to his boss, with all the negative consequences this strategy will have for his credibility with his manager.
- Creates the opportunity for him to go to his boss with the good news that he has safeguarded a key account and handled a difficult client situation effectively.

In order to accomplish these things simultaneously, and in the moment he is put on the spot, the glass supplier needs to think creatively. He needs to take responsibility for finding a way forward which leaves his client feeling good about his connection with him, but which also clarifies how cheeky the request being put to him is, and which does not leave his company open to being exploited either at that point or in the future, while also keeping the conversation friendly and customer-focused.

The glass supplier needs to find ways of keeping the conversation open while he thinks. He mustn't simply plump for the easy way out of saying he'll take it to his boss. Instead, he needs to ask questions of his client to find out what the context is for his request. He needs to point out that the request takes their business connection into different territory. He needs to make remarks to his client that clarify how awkward it will be to accomplish what is being asked of him. He needs to maintain an open, friendly, and engaged demeanor while he does these things to signal to his client that he is interested in maintaining their positive working relationship, values him as a client, is trying to help him out, is not fazed by the request, but does foresee certain obstacles in his way if he is to try and comply with it. This strategy also makes it possible for him to put the ball back into his client's court.

He could gently remind his client that their business up until that point has consisted of purchases of glass for the bottle manufacturing plant that employs him, and that moving their discussion onto issues around domestic housing is something that alters that. Then, in the same gentle but assertive tone, he could ask what has prompted the request, or comment that he could possibly take such a suggestion further, but that at the moment it would be a hard sell. He could say that such a request would

not go down well with his managers, and that previous similar requests have not gone down well for the person in his shoes either. He could place the onus for finding a way of selling this request to his bosses onto the shoulders of his client.

This way of handling things forces his client to look at the situation from his supplier's point of view, and gives him the opportunity to think again. It also means that the supplier retains control of the conversation, and gives his client the opportunity to come up with a business proposition that will make it worth his while to consider. It will now be up to the bottle manufacturer to suggest ways in which the 'favor' he requests might be facilitated. Of course, he may be disinclined to make the deal more favorable for the glass supplier, in which case the supplier needs to decide how to proceed.

If this is the case, then the glass manufacturer's choices actually remain unaltered: does he want to risk incurring the disfavor of his boss or risk alienating his client? If he decides that his client is in fact putting him and his company in a parlous position, and that he cannot accommodate him, he will have to say 'no' and find a way to deliver this message that is as palatable as possible, in the hope of being able to do business with him in the future. He could make it clear that he would not be able to gain buy-in to such a deal at the required level in his company. Or he could say that only the domestic side of the business deals with householders, and if this contact would like an introduction to those staff, he could arrange it but he has no authority to price up deals with them. However he delivers this message, there will be professional risks associated with it.

But if he cannot get his client to relent on his unreasonable request or to provide more business to make the deal possible, then the glass supplier has a clear choice. Is it better for him to go to his boss and relate how he protected his employer from being hoodwinked by an unscrupulous client, or is it better for him to go to his boss and ask him to sanction giving the bottle manufacturer buyer reduced-price glass for his house simply because he asked for it? Either option is possible as long as he makes a choice and communicates it clearly and assertively, providing his boss with full background information to indicate to him just how long and hard he has grappled with the issue before ending up telling his boss about it.

TAKING A STAND

Scenario two

In the second scenario the MD of the steel stockholding company decides that he must make three members of the senior management team redundant. He hates having to take this step, and finds it difficult to decide which of them to let go. Partly as a way of developing legitimate if flawed criteria upon which to make this decision, and partly because he wants to avoid making a hard choice, he opts to gather additional information about them via the leadership development coach he has worked with for ten years. He doesn't think that asking the coach to divulge information he is privy to as a result of a coaching meeting is unethical. He disregards the confidentiality and ethical considerations because of the stress he is under, and decides that the situation he is in justifies the request he is making.

The leadership development coach does not share this perspective, but finds it difficult to say so. He prevaricates, unable to give a clear answer to a request he thinks is unacceptable, but which comes from a client he has worked with for ten years. His consultancy business needs to retain this client account, and he knows that what is being asked of him is wrong. He operates from the firm conviction that a person with whom he is working can only make best use of their time with their coach if their conversations are completely confidential. But, when put on the spot by the MD of the steel stockholding company, the coach finds himself unable to draw the line. What could account for his dilemma, and how can he resolve it?

The leadership development coach values his relationship with this client, who has never before made such an unreasonable request of him. He is stunned at being asked to breach confidentiality, and for a few moments he is totally lost for words. His company needs this business after a slow quarter, and the demeanor of his client and the tenor of his comments convey to him that the request being put to him is not open to debate. In the split second available to him to decide how to respond, the leadership development coach becomes paralyzed. He wants to express outrage to his client, but he also considers anger to be an unprofessional response at work. So instead he decides to check out that has heard his client right. But he fails to do that effectively either, and in the silence that

follows his faltering attempts to handle the moment, he hears his client demand that he ‘work with him’ on the project.

The leadership development coach realizes too late that his client is not giving him much of a choice. Simultaneously his client realizes that the two of them are not going to see eye to eye on the issue, and rather than lose face and back down he sacks the coach, who has not managed to provide anything useful to the conversation. How could the coach have handled this situation differently and better?

In this situation it is vital that the leadership development coach put his own professional interests before his relationship with his client. In this case his professional interests include working in ethical and honest ways, preserving confidentiality with the clients he coaches, and being prepared to have straightforward and open conversations about these things with the MD of the steel stockholding company. The fact that he has worked with the MD for over ten years is irrelevant to the conversation that he needs to have with him. Immediately that he receives the request to divulge confidential information to his client, he needs to sit upright in his chair and clarify that he doesn’t work that way and cannot see his way clear to doing so in the current circumstances or any other circumstances. That’s it. He needs to maintain his professional standards, act with integrity, and take the hit that he might lose work. And given the frame of mind that the MD is in, he probably will lose work. But it will be better for his self-respect and reputation to clarify who he is, how he works, and where he draws the line, than to fail to say anything and let his client sack him for not complying with his authority. Either way, the relationship ends. But by handling things this way, at least the leadership development coach has laid down a clear ethical boundary to which he is committed and which preserves his dignity and reputation.

CLARIFYING THE BOUNDARIES

Scenario three

In the third scenario, the operations manager in the hotel chain hopes that her friendship with her internal supplier from human resources will prove advantageous to her. On learning that she has

received consistently poor 360-degree evaluation feedback during a time of personal crisis in her life, she hopes that her colleague will be able to turn a blind eye to the feedback, familiar as she is with the circumstances of her family life from their time together in the gym and when out for a drink.

Sadly for her, her colleague does not see it like this, and thinks that the feedback needs to be taken seriously and made the subject of an ongoing dialogue between them. She says so, and is astonished when her internal client accuses her of providing poor service and displaying a 'lack of perspective' in the matter. The two women cannot agree, and fall out quite quickly. Although they continue to work together, their relationship is impaired both professionally and personally. They do not socialize with one another again, and their meetings are formal and less effective than previously. Let's examine how the human resources advisor could have handled the situation so that she remained committed to her principles but did a better job of managing her client's expectations of their relationship, so avoiding the breakdown in communication that ensued when they fell out.

The basic issue is that when the operations manager reads the negative feedback about her recent conduct and is stung by it, she makes two quick decisions. Both of these decisions involve expectations which she has of her internal supplier, expectations with which she wants her supplier to comply even though she hasn't checked out either of them with her. The first decision is that the way in which her performance dipped during her family crisis should be regarded as understandable given the pressure she was under at the time, and that the issues can reasonably be glossed over under these circumstances. She takes this view early on in the process of digesting the feedback, and quickly becomes wedded to this method of handling the upset she feels at a series of critical remarks about her. The second decision is her assumption that her internal supplier will sympathize with this view, and be willing to work with her to gloss over the feedback. In taking this stance the operations manager blurs the distinction between her professional relationship with her colleague and her friendship with her. She expects her colleague to simply disregard the negative feedback about her performance because it occurred at a time of stress in her life, stress that she spoke with her friend about during their gym sessions and over a drink. Unless the human

resources advisor addresses the issue of the distinction between their two relationships openly and explicitly, in a tone that keeps communication between them open throughout the conversation, she risks losing the goodwill and active involvement of her client.

Once she understands what her client is asking of her, the human resources advisor needs to summarize that understanding and feed it back to the operations manager. Doing this will retain her control of a challenging conversation. It will also create an opening for her to point out the discrepancy between what her client wishes her to do and what she is being paid to do, something it is vital for her to get on the table if her client is to understand that her refusal to do as she wishes is not aimed at her *personally*, but is the only line she can take given their *professional relationship*. She could say that her understanding of the situation is that the operations manager wants her to ignore or downplay critical feedback collected as part of her recent 360-degree evaluation process, and that the feedback in question relates directly to a period of time in which the operations manager was under pressure because of her family crisis. She could then say that her role in the 360-degree evaluation process, and indeed what she is being paid to do, is to work with the operations manager to help her digest the feedback and address any areas for performance improvement which it raises, before touching base with her every so often as she implements those changes.

By framing her role in this way, and stating her expectations of the process she is managing, the human resources manager puts herself in a sound position. She presents the operations manager with a choice. She can try to pressurize her colleague into glossing over the feedback, or she can take it on the chin. The situation is clear, and if the operations manager does decide to pressurize her, the human resources manager can say quite straightforwardly that she cannot do what she is being asked to do, as she is being paid by her employer to carry out specific tasks and wants to accomplish them as effectively as possible.

Even though this might be a difficult conversation to have, it isn't likely to move the exchange into territory where the operations manager accuses her colleague of providing poor service, nor is it likely that the human resources adviser will feel that she is being asked to compromise herself professionally by doing a favor for a friend at work. The operations manager still won't get what she

wants. And things may become pretty unpleasant as a consequence, but she will understand the whys and wherefores of her internal supplier's actions, and despite her entrenched view, will likely understand why she is taking such a line. Their relationship may still become strained, but it is unlikely to break down as badly as it does when the human resources advisor handles things in her blunt and direct fashion.

YOUR INNER WISDOM

Those of you who work to professional ethical codes have access to a helpful set of guidelines that make clear the extent of your obligations towards your clients. These ethical frameworks are likely to describe the quality of conduct you are expected to offer when working with your clients, and will be helpful in enabling you to decide what you are and are not there to do. However, this chapter has been about how to handle a situation in which your valued and usually straightforward client has overstepped the mark, however subtly, and required of you something which is not okay with you, your role, your professional standards, or your conscience as you understand them.

In all of these cases, it is my view that the best and most accurate indicator of when a client has gone too far is the voice of your own inner wisdom. If you are not comfortable, you are not comfortable. So, when your own inner voice tells you that your client is suggesting something that leaves you feeling uneasy, has already done so, or is in danger of asking you to do something illicit, you can be pretty sure that your sense is reliable. In some cases, you may want to check out what you heard them to say. You could do this by reflecting back to them, in the moment you hear it, your understanding of what they are asking you to do. This could result in some clients realizing that they are out of line and taking the opportunity to backtrack. But for other clients, those who do not wish to back down but want to try and push you down a route you don't want to go, this won't be enough and you will need to be prepared to draw the line, firmly and kindly, but clearly.

It might seem easier, in some circumstances, to ignore your inner voice, in the hope that the issues will be short lived or go away. But, allowing a client to manipulate you once, in however

- What specific benefits would you hope to gain by handling the issues in this way?

SUMMARY AND NEXT CHAPTER

This chapter focuses on the tricky issue of how to maintain a viable relationship with a client who wants you to take actions which you consider to be beyond the call of duty, and with whom you have a largely positive working relationship. The chapter:

- Suggests that as you build productive, effective, and enjoyable relationships with your clients some of them may, from time to time, be tempted to take advantage of their positive relationship with you for a variety of reasons.
- Proposes that, for some clients, it is the very nature of your cordial relationship with them that might prompt them to step over the line and suggest that you take steps, which they oughtn't to ask you to take.
- Suggests that when a basically good natured but stressed client takes this approach you can afford to invest in your relationship with them even though they are stepping over the line in the hope that you can continue to work with them thereafter.
- Identifies a range of situations in which a client might be tempted to step over the line including times of personal or family stress, or to see what goods or services they could get at reduced cost, or at times of professional pressure, or because they have lost sight of the difference between their working relationship with you and their friendship with you.
- Proposes that you must find a way to stay in the difficult conversation at the time it occurs, no matter how compromised you feel, and explore the issues between you if you are to handle the situation effectively.

- Highlights that your job in this conversation is to handle the issues wherever possible so that you maintain the quality of dialogue and relationship between you while also making it clear where you draw the line.
- Examines what could happen should you get the balance wrong and draw the line too firmly without paying sufficient attention to the impact of what you are saying on your relationship with your client.
- Explores how handling the issues with a degree of sensitivity to the position of your client, rather than by simply looking at it from your point of view, will enable you to manage the situation more effectively in the long run.
- Implies that although many of you may work to professional codes of conduct, which place clear ethical obligations around your interactions with your clients, very often it is your own inner wisdom, which puts up a red flag when a client tries to manipulate you.
- Highlights that, when push comes to shove, preserving your integrity and maintaining your ethical standards is of paramount importance.

The next chapter explores two additional thorny client issues: those surrounding clients who have trouble with commitment and responsibility, and who say one thing to your face before doing something else behind your back; and those who are basically mendacious and are not above seeking to injure your reputation.

Trouble with Responsibility and Commitment

Clients who Say One Thing and Do Another

UNCOMMITTED, IRRESPONSIBLE CLIENTS

From time to time you are going to meet and work with clients who, however well you work with them and however much you like them as people, have trouble with commitment and responsibility. This client says one thing to your face but then goes away and does something else. They might say they will get certain things done by a specific timescale so you can get on with your job. But they don't. They might say they will arrange to introduce you to their colleagues so you can get their input to your evolving project plans. But they never do. They might say they will read the status update report, which they have asked you to write and put to them, and then get back to you. But, despite the fact that you chase them for a much-needed response, you never get one.

Some of these clients are simply dissemblers: people who want to mess you around and might even get a kick out of doing so. In the main, their irresponsibility is verbal: they say things about you or about themselves that are not quite true, wholly untrue, or to which they have no commitment, and when you call them on the discrepancy they disown what they have said and simply move on. Other clients, though, are more complicated than this, and the irresponsibility they display is of a completely different kind.

These clients don't set out to mess you around for the sake of it. They are not motivated to deliberately make things difficult for you or to purposefully mess you about, although their irresponsible and uncommitted behavior can certainly cause both of these outcomes. Rather, the behavior of this second set of clients is more to do with the fact that, when they perceive it to be in their interests, they:

- Baulk at remaining committed to the workload they are responsible for handling on the project you are managing for them.
- Don't take account of the consequences of their actions for you or anyone else when they handle things this way.
- Run scared and avoid, until they are forced to confront them, the responsibilities that sit with them, no matter how uncomfortable this approach makes it for other people, you included.

We will consider how to manage and work with both of these sets of clients in this chapter, starting with the second group.

YOUR CLIENT'S INTERNAL AGENDA

You have built a productive and effective relationship with your client over a period of weeks. You find them relatively straightforward to work with, someone who in the main does what they say they will do by when they say they will do it, and who has extended to you appropriate levels of trust and control. Until, that is, something changes with them and they start to use a different approach. They become more difficult to get hold of. They appear evasive and ambiguous in their dealings with you. They don't make decisions or provide input when you request it. And eventually you can't get hold of them at all. Something fundamental has changed with your client, something internal to them, which now means that they have adopted an approach that is more irresponsible than responsible, and more uncommitted than committed.

When employing this new *modus operandi* your client appears to consider only one set of issues: their own internally derived wishes. You don't know the exact ins and outs of this agenda, but it seems to result in their becoming less than forthcoming in their dealings with you. When in this mode your client:

- Doesn't think through the impact of their tardy responses or failure to respond on you or the project you are managing for them.
- Consistently handles things in ways which serve their own internal agenda to keep things loose, ill-defined, and inexact

without considering what these actions will mean for the wider project you are involved in managing.

- Only sees the situation from one perspective – their own – and prefers to ignore, disown, or downplay the issues that their irresponsible conduct creates for other people.

When behaving like this, this client has a strong preference for leaving room for maneuver in all their dealings with you and anyone else they are working with. They fail to keep their commitments to you. They don't turn up to meetings which they have arranged with you. They miss agreed deadlines for getting information to you, information which you need so that you can carry out your work. And crucially, they don't inform you about any of these things in advance. They simply don't do what they have agreed to do by when they have agreed to do it, then leave you to work out what is happening for yourself.

The signals that your client is acting out of a hitherto unknown irresponsible, uncommitted streak can initially be subtle and easy to miss. But it is in your interests to spot them early on so you can employ the most advantageous tactics in handling them as soon as possible. Missing the true motivation of your client might result in your misjudging the moment and failing to keep communication open with someone who, if you approach them skillfully and effectively, could yet remain an active and engaged customer and effective sponsor of your work.

DELIBERATELY LETTING THINGS SLIP

Consider the following short scenarios.

Scenario one

A secondary school teacher likes to be in the spotlight, and enjoys what she sees as unconstrained relationships with her colleagues and workplace contacts. Her role includes purchasing equipment for the school's science labs. She decides to meet with an existing supplier, someone with whom she has done business many times before, in order to explore ways in which his company could assist her by upgrading the school's science equipment. During an apparently cordial meeting which she arranges, she agrees to set up a second

meeting, this time with the head of science, at which the three of them could discuss new supplies for the school's chemistry and physics labs. The secondary school teacher ends the meeting by promising to get back to the supplier with a date and time for the meeting by the end of the week. But she doesn't keep her word. Over the next three weeks the supplier calls her a number of times to find out where she has got to with the meeting, but all his voice messages to her go unreturned. He reluctantly decides that she has changed her mind about dealing with him and that he is wasting his time, so he mentally strikes her off his list of customers and, disappointed at a missed opportunity, applies his attention to his other clients.

Scenario two

A busy trading team in an investment bank engages its in-house technology team to design and install an upgrade to one of the systems that the traders use day in, day out. The IT team leader meets with the trading team desk head twice a week for three weeks as they discuss the various options and proposals available to him, and the differing costs attached to each of them. As the deadline for the decision about which option to commit to comes closer, the IT team leader finds it more and more difficult to get time with the trading team desk head, who is either 'in a meeting' or 'unavailable' when the team leader calls him. Frustrated, the IT team leader calls the desk head's PA and puts a meeting in his diary for the next day. When he arrives for the meeting his client is not in his office, does not respond to his pager, and rejects the call he places to his mobile phone. The IT team leader thinks that his client is avoiding him, but doesn't know why, and returns to his office where he informs his colleagues that something must have gone wrong behind the scenes, but he doesn't know what. The technologists then spend several hours discussing possible ways in which they could handle this evolving situation so that they don't lose face with their clients, time that they really needed to spend finalizing their plans for carrying out the work.

Scenario three

A status-conscious and attention-seeking insurance executive initiates telephone contact with a sales consultant she did business

with when she was with her previous employers. The insurance executive speaks with the consultant for over an hour, describing to him various issues and problems that affect her sales operation. She listens attentively to what the sales consultant has to say in return. The executive appears genuinely interested in the perspective and suggestions offered by the consultant. After an hour she volunteers how much she has enjoyed the call, says that she thinks the consultant will be well equipped to help her and her sales team make progress on the issues they have discussed, and says that she would like to talk further. She specifically states that she will go away and sensitively generate trust with some of her senior sales colleagues, sufficient that she could invite the consultant to a face-to-face meeting at the firm's offices in due course. They agree to speak again in two weeks' time. When the consultant calls her as agreed a fortnight later, he starts the meeting by asking where she has got to with her dialogue with her senior sales staff. The insurance executive is bemused and asks him what he is talking about. The sales consultant is dismayed to discover that she hasn't spoken to anyone, can't remember saying she would do so, doesn't seem troubled by this fact, and isn't impressed when he presses her for a commitment to do so over the next two weeks. The sales consultant decides that they cannot take their dialogue further without involving other people in it, so he requests that they speak again once the insurance executive has had those conversations. On hearing this request the insurance executive decides to end the call straightaway, claiming that the consultant isn't 'ready for the discussion' she planned to have with him, and that she 'is busy.'

MENTALLY OPTING OUT

In each of these situations a supplier thinks that they have established a good enough relationship with the client that they can reasonably expect the client to do what they have said they will do by when they said they would do it. In each case they are disappointed when this turns out not to be the case. In each of these scenarios the client mentally pulls out of the deal at some point in their discussions with their supplier without saying so directly, and instead lets their supplier know that their commitment has wavered purely through their altered behavior. They simply fail to keep their side of a bargain, and:

- The teacher doesn't set up a meeting she said they would set up with the head of science.
- The trading team desk head doesn't decide which of the technology team's proposed options he wants to pursue and inform them of that choice.
- The insurance executive doesn't go away and build trust sensitively with their sales team so that she can subsequently introduce the sales consultant to them.

In each of these cases it could simply be that the supplier has mismanaged something pivotal, and lost their client's trust, respect, or goodwill. But in none of the cases is this actually the way of it. In none of these cases has the supplier made an error of judgment or mishandled something important to their client. And, because none of them understands the apparent change of heart in their client, each supplier could wrongly conclude that they have done something wrong, especially if they are conscientious and minded to take responsibility for how they behave towards their customers. In this case they could spend precious time trying to work out what they:

- Are responsible for getting wrong.
- Can do to repair the damage.

But actually the issues don't rest with them, or with any untoward mistakes they might or might not have made in managing their relationship with their client. In each of these scenarios the client mentally pulls out of the deal halfway through because of their own intra-personal issues. And in each case, the client lacks sufficient integrity to tell their supplier that they have changed their mind. Instead, in order, they simply:

- Ignore telephone calls and leave the school's supplier in the dark as to why.
- Drop out of a business dialogue close to a decision point and avoid taking calls or attending a meeting with the lead technologist who needs to know which option to pursue and what is going on.
- Blame the sales consultant for 'not being ready' for the discussion when it is they who have failed to do what they said they would do in the lead-up to the call.

RE-ENGAGING WITH YOUR CLIENT'S ISSUES

If the supplier in each of these cases is to handle the moment well, they need to find an effective way to re-engage their troublesome client with the issues they were speaking with them about before the unexpected hiatus. They need to:

- Avoid blaming themselves for mishandling their client.
- Remain committed to their client and their client's best interests.
- Remain convinced that they have something of benefit to offer their client.
- Understand what is really going on in the mind of their client that has resulted in their pulling out part-way through a dialogue.
- Address those specific issues from their client's perspective and convince them that it is in their interests to keep talking.

How they do so is up to the individual supplier. It will take interpersonal prowess, skill, and ingenuity to prise some of these characters away from their cherished irresponsibility and lack of commitment. The starting point for doing so effectively is to see these traits as *coping strategies* which are not actually that useful to your client, rather than seeing them as simply annoying or provoking character traits, although they are certainly in that category too.

The challenge facing you as a supplier caught up in these dynamics is to help your client re-engage with the issues with which it is in their best interests to engage, even during the period when they are minded to ignore those issues and to characterize you as impatient, harassing, or an irritating nuisance who wants time they don't have to give. In order to do this well, you need to understand the intra-personal factors that account for the behavior of your client. Why would an apparently relaxed and confident client suddenly get cold feet and display such low levels of commitment towards their own stated wishes, and such low levels of responsibility towards you, that they simply opt out when it suits them? And, given this level of ambivalence towards both commitment and responsibility, how do you respond positively so that you convince your client that you have value to add and that it's in their best interests to maintain their dialogue with you?

INTRA-PERSONAL FACTORS AND COPING STRATEGIES

The temptation if you have clients like this is to:

- Take a step back from the situation and lose contact with your client during a time of tension in their professional life.
- Remain in contact with them but fail to handle them in an influential way, one that takes their intra-personal agenda into account, and miss the opportunity that does exist for influencing your client that it is in their best interests to continue to speak with and work with you.

To handle the moment well you need to understand what is going on in the mind of your client. Let's examine what intra-personal factors prompt each client in the scenarios above to adopt uncommitted and irresponsible strategies in their dealings with their supplier.

Scenario one

In the first scenario, the schoolteacher wants very much to upgrade the school's science equipment. She wants to be seen by her school colleagues as someone with the right contacts, someone able to effect positive change, and someone who knows how to get things done. She is an excellent teacher and well liked, but she doesn't quite have the degree of influence she would like to think she has with the head of science, a difficult man who prefers to deal with departmental heads rather than teachers.

As far as her supplier is concerned, she is going to set him up with a meeting with the head of science so he can outline how he could upgrade the school's chemistry and physics labs. The schoolteacher is the one who suggests this meeting, and the supplier has no reason to doubt her word. Until, that is, she doesn't do what she says she will do by when she says she will do it, and his subsequent calls to find out where she has got to do not elicit any response at all from her.

What went wrong? Initially the schoolteacher does want to set up the meeting with the head of science. She thinks that by introducing him to a useful supplier she will be able to influence the head of science's view of her. But, she doesn't do sufficient

homework before she decides upon this course of action, and she hits a snag. She finds out that the head of science has already set up a meeting with a different potential supplier, one with whom he has a longstanding business relationship, and with whom he enjoys the occasional round of golf. She decides that it would be unwise to suggest that he meet with an alternative supplier at this juncture, and rather than go back to her contact and clarify matters, she decides to simply let the matter ride. She doesn't want to have to go back to her supplier and confess that she spoke prematurely. She doesn't want to appear lacking in influence. She doesn't want to own up to the fact that she doesn't have the kind of connection she claimed to have with the head of science, and can't, in fact, deliver the promised meeting.

But she doesn't plan on the resolve of the supplier, and the more voice messages he leaves for her over the next two weeks, the more uncomfortable she feels. Unable to come clean and tell her supplier what has happened, she does nothing and hopes that the supplier will go away, which he eventually does. Caught between admitting she had made a promise she can't deliver on, and trying to exert influence she doesn't have with a senior member of staff, she opts out and displays a lack of commitment to her own promises and a lack of responsibility to her supplier.

Scenario two

In the second scenario, the trading desk head is tasked with making an IT decision about which he has no obvious knowledge and no previous experience. The trading system upgrade is a costly and high-profile project, and he does not really want to be in the box seat on such an expensive, highly visible, and therefore risky project. His reputation and credibility are at stake, and he is acutely aware of his exposed position. He would much prefer that someone else work with the technology team, preferably someone more senior than him. But he was asked by the head of global markets to handle this project and he didn't feel he could decline it. He can just about cope with his level of internal anxiety at having to shoulder this responsibility as long as the ins and outs of his discussions with the technologists remain merely theoretical. But as soon as they become real and he has to make an actual decision, his anxiety levels go through the roof. He mentally runs. He ignores the lead

technologist's telephone calls, dodges the meeting he puts in his diary, and does all he can to avoid being held to account by him. Quite simply, he does not want to make the decision with which he is tasked. He had hoped that the technologists would make the decision and recommend the best option to him, so he could then present their decision to the head of global markets.

But things do not play out this way, and when the lead technologist presents him with three alternative ways forward and asks him to select one, he becomes paralyzed with self-doubt and unable to make the decision. Rather than face his fear, he opts out. This coping mechanism will buy him some time, but not much. In a few days he will have to face up to his position anyway. The head of global markets will start to ask him where he has got to with his decision, and he will be put under pressure to provide an update. But he isn't thinking that clearly or that far ahead. His sole motivator is to avoid sticking his head above the parapet by making a choice that he doesn't feel equipped to make, even with the assistance and guidance of the technology team. He feels trapped, and handles this discomfort by avoiding the responsibilities which sit with him.

The lead technologist doesn't know any of this, and comes to the wrong conclusion that something political has gone on behind the scenes which has affected the progress of the project. Faced with this unwelcome conclusion, he calls a meeting with his technology team colleagues at which to discuss their options and decide how to approach the situation. This meeting wastes an entire afternoon. It doesn't address the real issues which sit with the trading desk head, and it creates a huge red herring when he and his colleagues could usefully have been engaged on other urgent client business.

Scenario three

In the third scenario, the attention-seeking insurance executive does really enjoy the initial call with the sales consultant. In fact she enjoys it so much that she says she will go, there and then, and speak with her sales colleagues about the ideas and suggestions the sales consultant has put to her. But, after ending the call she gets involved in a series of pressing work issues that tax her and leave her drained. She simply moves on and forgets what she has committed to do. Her attention is taken up in the moment, and

her need to be in the spotlight is assuaged by the presentations and meetings in which she is involved over the rest of the day. So she concentrates on making progress on the various urgent matters that land on her desk, and fails to discuss her call with the sales consultant with any of her colleagues. She doesn't do anything at all towards generating trust around the issues she spoke with the sales consultant about, and she simply goes about her usual business in her usual way.

When she takes the next scheduled call with the sales consultant two weeks later, she is genuinely looking forward to another conversation which will feed her need to talk about herself, and be actively listened to. It isn't in her mind that she had promised to speak with her colleagues about setting up a meeting with the sales consultant. She expects a call in which her unconscious need for attention and approval will be met by her supplier, who is skilled at responding to her agenda and listening to her attentively. But her supplier doesn't know any of this, and at the start of the call, expects his client to have made progress selling his services to her colleagues. The sales consultant is disappointed that his client hasn't done so, and then astonished that she cannot remember having said she would do so. He sees this as baffling and disingenuous. The sales executive, on the other hand, is embarrassed that she might have said she would do something that she cannot remember having said.

Rather than admit this oversight, she employs the coping strategy of getting angry with her supplier. She feels angry that she has set aside time to speak with a supplier who then ticks her off for not doing something which she doesn't think it is her job to do. In a split second she becomes annoyed at the sales consultant for expecting *her* to generate interest in the consultant's ideas – a task she decides sits fairly and squarely with the consultant – and determines to save face and re-establish the principle that she is the client and her supplier is the supplier by getting out of the call. She tells the sales consultant that she doesn't think he is ready for the call, and that as she is busy that day, she would be better off at her desk. The two of them approach the same call with entirely different objectives and entirely different expectations, and the supplier is so surprised by this turn of events that he doesn't know what to say next. In that moment, he loses his client and a project he would have enjoyed and handled well.

ASSUMING RESPONSIBILITY FOR WHAT YOU CAN INFLUENCE

So now that we know more about the reasons behind each client's uncommitted and irresponsible behavior, let's consider how each supplier could have:

- Handled their client differently and better.
- Maintained a productive dialogue with them.
- Found ways to keep communication with their client open around the issues that matter most to their client.
- Stood a good chance of retaining their business or, at least, have preserved an effective relationship with them so that they could be considered for future work.

Scenario one

In the first scenario, the supplier is expecting the secondary school teacher to set up a meeting for him with the head of science. When she doesn't get back to him with a date and time as he expects, he understandably enough calls her and leaves a voice message for her. She doesn't return that call, so he calls her again a few days later and leaves another voice message, chasing her for the date and time of the meeting. It is from this point onwards that the supplier mishandles the situation.

Calling again and again won't do it. It isn't a question of the teacher having failed to pick up the first or subsequent messages. Leaving another one saying the exact same thing won't influence her to return the call if this tactic hasn't been fruitful the first time round. Leaving message after message merely perpetuates a dynamic in which the supplier rings his client and leaves a message for her to return the call. She then ignores the message. He feels frustrated and is rendered powerless in the situation. Instead of making a second identical call the supplier needs to change tack.

On realizing that his first call has not been returned, the supplier needs to retain what little influence he has in this situation and leave a message which engages the teacher in a dialogue about the reasons why she hasn't returned the call. He needs to make an educated guess about what might be preventing the schoolteacher

from setting up the meeting with the head of science, and address this issue *from the point of view of the teacher*.

As he has no concrete information to go on, he needs to couch this part of the message in carefully worded terms that make it clear he isn't hassling her, but is keen to add value to her work, and recognizes that she has a lot on her plate. He might say that he is aware that she has a full workload and that he'd like to take the task of setting up the meeting with the head of science off her to-do list and put it on his. He could then add that he'll go ahead and contact the head of science himself, and then ask her to let him know whether or not she'd like to be involved in the meeting. This approach will create some momentum in the situation, will make clear his intention to lighten her load, will take the responsibility for setting up the meeting away from her, but will still make it possible for her to be involved in it should she wish. It is a simple but effective tactic. Without his knowing the ins and outs of the situation, this approach enables the supplier to address the intra-personal issue at the heart of the teacher's dilemma – that she has put herself in a position where she does not think she can bring about a meeting she has promised to set up – but does so without embarrassing her or raising the specific issue of her lack of influence with the head of science. It is sensitive and straightforward.

Of course, the supplier cannot know for sure that this form of words will hit the spot. But since his initial approach isn't going to work, he has nothing to lose by trying this tack instead. And in this case, it is exactly what the secondary school teacher needs to hear. It relieves her of the responsibility to set up a meeting she no longer wants to sponsor, and gives her the option of being involved in it if she wants to be. It also means that the supplier is free to contact the head of science to set up the meeting. And it leaves him free to contact the teacher again in the future to discuss other ways in which his services might benefit the school, safe in the knowledge that she will likely speak with him rather than simply ignore his message. In this case, taking the responsibility off the client and assuming it for himself serves the supplier well.

Scenario two

In the second scenario, a lead technologist comes to the conclusion that his client is unable to get back to him because of a political

factor, the exact ins and outs of which are unknown to him. In making this decision, the lead technologist gives undue weight to the difference between his client's behavior prior to his disappearing act – straightforward to deal with, available, and open – and his current behavior: evasive, avoidant, and confusing. He attributes the difference to an issue external to his client, a political one, and decides that he has been caught up in it and it has rendered him unable to speak with him further, perhaps because of the sensitive nature of the situation that has arisen. The lead technologist has no actual evidence for this conclusion, but thinks it likely because he does not know how else to evaluate his client's volte-face.

In fact, he is barking up the wrong tree completely. This client's changed behavior is entirely down to his own internal tensions, tensions which originate in his fears and anxieties about shouldering such a weighty decision and having to present it to the executives to whom he reports. The technologist makes an error of judgment in jumping to this conclusion, and wastes an entire afternoon of his and his colleagues' time formulating options for handling the nonexistent political ramifications. What could he have done differently?

It is true that his main issue is his inability to get time with his client. Instead of pursuing him with calls and unilaterally putting time in his diary, he needs to send his client an email marked urgent in which he addresses his understanding of his client's fears. Of course, his dialogue with his client up to this juncture needs to have been close enough that he is aware of his client's anxiety about handling this project. He needs to have already asked him explicit questions about his concerns around the project, which issues in particular he would welcome closer dialogue around, and which aspects of the project warrant additional time and discussion between them. Without this information he will be in the dark at a time when he cannot afford to be. With this information, he will be well placed to handle his client's cold feet effectively. Never is a supplier's need to get to know his client's emotional make-up, fears, and anxieties better illustrated than in this scenario. Assuming that the supplier has done his work diligently to this point, he can now use his knowledge of his client to help him manage his crisis of faith in his own decision-making skills.

The crisis is intra-personal to the client, but it is one that the technologist can do something about. The technologist needs to

send a sensitively worded email to his client explaining that as the decision point draws closer it might be worth the two of them sitting down and going through the options again to identify the specific risks and mitigating factors relevant to each of them. The email could then say that handling things this way would enable his client to present the risks and mitigating factors as part of his thinking to the executive team before asking them to buy in to the rationale behind his decision.

This is a clever way to frame the meeting that the technologist wants to have. It directly meets the trading desk head's need to understand which option represents what risk, and which risk is mitigated in what way, and therefore enables him to make a careful, informed decision. It enables the lead technologist to guide the desk head through what, to him at any rate, appears a minefield of decision-making criteria, and point him towards the most advantageous and effective decision. And it gives the desk head the exact arguments to use when he presents his decision to his executives and asks for their ratification. It therefore lessens the load that the client thinks he is carrying, enables the lead technologist to make the decision more manageable, and demonstrates to the client that his supplier understands how onerous the task before him is and can help to make that load more do-able. This strategy will win the lead technologist the gratitude of the trading desk head, and should go some way towards deepening their business dialogue.

Scenario three

In the third scenario, a sales consultant starts his second call with an egotistical insurance executive expecting his client to have done some work behind the scenes following their initial call. In fact, he expects his client to have prepared sufficient trust with her colleagues that he could arrange to meet them and speak in more detail about a project with a wider number of them. He begins the second call by asking where his client has got to with these enquiries, and is bemused and disappointed when his client accuses him of not being ready for the call before abruptly ending it.

What did he do wrong? The first thing he mishandles is the focus of the meeting. He approaches it *as if it were his meeting*. He starts the meeting off by introducing his agenda item, and asks his client straight away where she has got to with her efforts to build

trust. This is quite a big mistake to make with an attention-seeking client because it changes the focus of the meeting away from what his client wants to speak with her about – something he never checks out – and makes it about his own agenda instead. On the one hand it might look like a reasonable mistake to make. Starting the meeting this way picks it up at exactly the point at which the previous meeting ended. But on the other hand, he is the supplier and his client is the client. And really it is his client's meeting, not his. By introducing his own agenda so early on in the meeting, right at the start in fact, the sales consultant sends his client the clear signal that he is not in service mode at all, but is expecting his client to do something for him.

To most clients this would feel wrong because it places the responsibility in the wrong place. But to this self-serving and vainglorious client it is doubly wrong. She feels slighted and annoyed: slighted because her own agenda – to be heard and understood – is being sidelined by a supplier, and annoyed because she thinks this supplier is overstepping the mark in placing a set of expectations upon her. The insurance executive is instantly cross, and rather than say so directly, she accuses the supplier of 'not being ready for the meeting.' She then says that because she is busy she needs to get back to her desk, a remark that effectively characterizes the conscientious sales consultant as a time-waster. The sales consultant shoots himself in the foot before the conversation begins.

He would have been much better off approaching the telephone meeting as an opportunity to listen to his client's agenda and offer value to her over those issues before introducing his own agenda. Even if it means going over old ground again, the fact is that his client has turned up to the meeting and does want to speak with him. His job is to listen to her, reflect back his understanding of her concerns, and demonstrate how he is well placed to address them. For a consultant who specializes in sales, these ought not to be difficult things to get right. The fact that they pass him by makes the loss of this client all the more painful for him to take.

YOUR CHALLENGING CLIENTS

You might now like to apply the material from this chapter to your own working life. Identify a client who you think handled things

- Looking back on it now, what could you have done differently and better to address the issues behind your client's irresponsible and uncommitted behavior?

RE-ENGAGING AN EVASIVE CLIENT: KEEPING COMMUNICATION OPEN

We have been discussing situations in which your client has suddenly and without explanation reneged on previous agreements, and opted out of a dialogue with you. In these circumstances, the onus is on you as the supplier to find the most productive and effective way to enable your client to re-engage with the issues from which they are running so that their irresponsible and uncommitted behavior doesn't damage your embryonic or part-completed project. In practice, this will mean:

- Putting aside your chagrin at your client's conduct.
- Looking at the situation from their point of view.
- Identifying what issues they are struggling with and how these issues are affecting them.
- Offering them assistance to address and manage these issues.
- Presenting yourself to them as the person best placed to guide them through these issues and enable them to find a workable solution to them.

The pivotal factor in each of these situations is:

- Your knowledge of and skill at handling your client's personality.
- The fact that no matter how provoking and difficult their behavior is to deal with, it is *not purposefully intended to cause trouble for you*.

But if, despite your best efforts and despite building a close

working relationship with your client, you have no idea what is behind their volte-face, how do you proceed? In this case, your task becomes one of approaching your client with an offer of help which is designed to enable them to open up to you about what is causing them to stall on their obligations, while also positioning you as a helpful adviser to them as they come to terms with their internal dilemma. Here is a suggestion for how to do this:

- Contact your client and point out to them, in non-judgmental language, the discrepancy between what you were expecting from them and what in fact has happened. For instance, you might say that you were expecting a meeting at which to finalize the way forward on the project and have found it difficult to get hold of them or to get time in their diary. Or you might say that you were expecting them to get back to you with a decision and they haven't done so, which means that you cannot make progress on a project on which the original deadline remains unaltered.
- Point out that the issues on which you need their input can't wait, and that you are due to give your own boss an update on progress in the next few days.
- Suggest that one way forward might be for you to meet with your client and address any specific issues that might be challenging for them right now.
- Say that your aim for the meeting will be to create a sufficient level of comfort around these issues that your client will be able to move things forward as planned.
- State that you are committed to handling all aspects of the project to standard and on time.

This combination of non-evaluative support, sensitive challenge, and firm boundaries is likely to prod your client in several ways. It:

- Calls them to account for not doing what they said they would do by when they said they would do it.
- Makes it clear that you will not be fobbed off and are quite determined to see the project through to conclusion.
- Presents them with a choice: either to come to the table and finish the business or not, but if they don't you will take things forward without them anyway.

- States that your clear preference is for them to re-engage with you and their responsibilities, and for you to provide them with what they need so that the project can resume on time and to standard.

Most clients who are basically scared, rather than out to cause a problem for you, will respond positively to this approach. But what about occasions when your client's irresponsible and uncommitted behavior is of a completely different kind, the kind that jeopardizes your reputation? What if it *is* purposefully intended to cause trouble for you?

DAMAGE LIMITATION

In these cases the situation you need to handle is not about finding a way to get your client to re-engage with the business issues they are avoiding. It is more about your need to hold them accountable for what they are saying and doing, actions and words that are injuring your credibility and compromising your work.

Let's explore these issues by returning to the scenario we first considered in [Chapter 1](#). In this scenario a departmental head in a hospital does not want to participate in the internal pharmacy inventory that she is required to complete each year. She is a highly challenging character to deal with: someone who states one thing in a meeting but then subsequently handles the issues completely differently once she has returned to her desk. When the pharmacy team member assigned to her department arrives at her office for the preliminary inventory meeting, she looks him straight in the eye and tells him that his work is a waste of her time, before informing him of her opinion that his duties do not represent a useful contribution to the work of the hospital as he might think, but create another problem for her to manage. Let's return to this scenario and see how the situation plays out.

CASE STUDY 4: HELD TO ACCOUNT

Despite being stung by the tone and content of his internal client's comments to him, the pharmacy team member doesn't leave the departmental head's office as she hopes he will. She sits across her desk from her, and although he is momentarily stunned into

silence at the tenor of her voice and the nature of her comments, he quickly gets a grip on his emotions. He sits upright in his chair and looks her levelly in the eye. He tells her that she may not want to participate in the pharmacy audit, but that it is his job to ensure that she does provide him with the information he needs. He asks her to put her personal dislike of him, his role, and the tasks he is there to perform to one side for a moment, and provide her with the inventory information he needs to complete the work he is there to do. His tone is clear and firm, and his voice is resolute. He recognizes that she might not respond favorably to someone as junior as him holding such a firm line with her in her office, but then again, he can't see that he has any choice under the circumstances if he is to carry out his role.

In the silence which follows his words, the departmental head shifts slightly in her seat and picks up the telephone receiver. She asks her PA to enter the room, and once she has done so, she instructs her to assist the pharmacy team member with the matters he is there to resolve. Then she stares at her internal supplier and makes it clear that she wishes him to vacate the room. He does, and is surprised that his use of simple assertion seems to have worked for him, and that it appears to have won him the right to collect the information he needs. Sadly for him he misjudges the impact that his carefully calculated words have had on his client.

Over the next few weeks, as he continues to visit each department to carry out the inventory work he is tasked with performing, he realizes that colleagues with whom he had previously had a positive working relationship appear not to respond so openly to him. At first he thinks he is misreading the situation. But after three incidents in the same department where previously cordial colleagues are offhand with him, the pharmacy team member asks one of them what is wrong. He is shocked to discover, after some probing questioning on his part, that the departmental head has bad-mouthed him to her peer group. Her reported lies about him include that he was tipsy at work after coming back from lunch late while working in her department, that he was dilatory and sloppy in his approach to collecting factual information for the inventory, and that he had been disrespectful to her in her office. The head of department is a significant figure in the hospital, and the pharmacy team member is stung that she could misuse her power and influence in this way simply because he stood up to her.

Three days later, having completed his inventory for his department, the pharmacy team member needs to return to the head of department's office and present his findings to her. He decides to take the opportunity to confront her over her seemingly deliberate attempt to damage his reputation. There are several ways in which he could handle this confrontation. Let's examine three of them.

- The pharmacy team member knocks on the head of department's office door, takes a deep breath, and walks in. He hands his report over to her. Then he angrily tells her that he knows she has been lying about him, and that some of what she has said has come back to him. Then without waiting for a reply he abruptly turns on his heels and leaves her office.
- The pharmacy team member knocks on the head of department's office door, takes a deep breath, and walks in. He hands his report over to her. Then he looks the head of department in the eye, and tells her that he was disappointed to hear her comments about him.
- The pharmacy team member knocks on the head of department's office door, takes a deep breath, and walks in. He hands his report over to her. Then he tells her that he understands that she has made some remarks about him and his conduct that reflect her dissatisfaction with him and his work. Without pausing for breath, he says that he would like to talk them through with her. He motions towards the chair across from her desk, and when the head of department does not demur, he sits down. He asks her in an open and enquiring tone what she would like to say to him.

HELD TO ACCOUNT: ANALYZING THE DYNAMICS

In this case study a pharmacy team member has to confront the fact that his internal client, the powerful and influential head of department, has been lying about him behind his back, apparently with the sole intention of discrediting him to his colleagues simply because he stood up to her. It requires all his resolve to confront her. Let's take a look at what is happening in the three scenarios.

The first instance

The pharmacy team member is furious that a departmental head has behaved so badly towards him. He can't believe that she could use such a devious method of getting back at him as to generate three lies about him and disseminate them behind his back. Disappointment that a senior member of staff could display such a lack of integrity and basic honesty gets the better of him. When an opportunity to speak about these issues with her presents itself to him in the normal course of his work, he decides that he must have a go back at her. After going to her office to hand over his inventory report to her, he takes the opportunity to tell her in an angry voice that he knows she has been lying about him, and that some of what she has said has got back to him. Without waiting for an answer, he turns on his heels and walks out of her office.

In his mind the rightness of his position and the wrongness of hers are all the justification he needs to set the record straight, and having said his piece, he feels better about the situation. It doesn't occur to him that having been confronted about her behavior, the head of department will fail to see the error of her ways. His somewhat naïve expectation is that, having been ticked off, she will naturally feel remorseful about what she has said and desist from spreading any more untruths about him. He does not expect an apology or even an improvement in the quality of dialogue he has with her, but he does expect that she will feel uncomfortable about what she has done and avoid slandering him in the future. He is horrified to find that, on returning to the pharmacy, he is confronted by his manager who has just finished taking a call from the angry head of department. His boss rounds on the pharmacy team member for what he terms his 'total lack of political awareness' in 'speaking so deplorably' to a senior member of staff.

While we can sincerely sympathize with the horrible situation the pharmacy team member finds himself in, we can also understand that he has indeed demonstrated a severe lack of political judgment in his handling of this unfortunate affair. Being an essentially honest member of staff, he naturally assumes that the departmental head, once shown the error of her ways, will realize that she has got it wrong in this instance and will immediately regret her actions. He has totally misunderstood her character. In fact, rather than reveal remorse she ups the stakes. She picks up the phone and

castigates the pharmacy team member to his manager, adding insult to injury. Now the pharmacy team member has to deal with a senior member of staff who has already lied about him scurrilously to other internal clients evolving into someone who is quite capable of making trouble for him with his own manager. This is a sorry situation for the pharmacy team member to find himself in, especially as his own boss is not a resolute man and finds it difficult to stand up to authority figures.

The pharmacy team member now has his work cut out to right two sets of wrongs: one among his internal client base and one with his own manager. His poor handling of his confrontation with the departmental head has resulted in his losing even more favor, even though right was, strictly speaking, on his side. He also has to deal with the growing realization that the departmental head might continue to use her position and influence to discredit him and to further injure his reputation, simply because she is minded to, and because his own misjudgments have contributed to a bad situation becoming worse.

The second instance

The pharmacy team member realizes he is outgunned. The seniority and influence of the head of department are such that he cannot really go into her office, tell her what he thinks of her, and hope to walk out having achieved anything constructive. So he decides to tell her how he feels about being slandered in the hope that this tactic will appeal to her better nature. Having handed over his report to her, he tells her that he was disappointed to hear her comments about him. He consciously frames his conversation with her as one person speaking candidly and openly to another, person to person. He doesn't frame the conversation as an internal supplier speaking with an internal client about business issues. Instead he makes it a more personal and less commercial dialogue, in the hope that this tactic will get him farther with the irascible head of department. Then he falls silent and waits for her speak.

In the split second the head of department has to decide how to play this conversation, she decides that she doesn't like what she sees as a degree of presumption in the young man and picks up the telephone. She rapidly dials a number. As she waits for

the person she is calling to take the call, she looks briefly at the pharmacy team member before telling him briskly that she is busy and doesn't remember speaking about him. Then she goes back to her call and effectively dismisses him from her office.

The pharmacy team member is forced to leave her office without having achieved anything useful towards remedying a situation in which he is the injured party. In fact he has learned that the head of department is a formidable foe. His tactic of trying to appeal to a degree of goodwill in his colleague falls completely flat. She presents herself to him as someone who doesn't have a softer side, and who isn't concerned with the position she has put him in. In fact she appears so totally unconcerned about the upset she has caused him that she makes a call rather than discuss the issues with him. He does leave her office without having exacerbated the situation, but then again he hasn't secured any reparation either, or any assurances that she won't repeat her offensive behavior.

Only time will tell whether she does or does not decide to slander him again in future, but the head of department has now learned that if she does do so in the future, her pharmacy team colleague will not be well equipped to call her to account for her conduct.

The third instance

The pharmacy team member realizes that he is in a tricky position. He thinks that if he wants to confront the head of department effectively he will need to demonstrate considerable skill and maturity in handling his upcoming interview with her. He cannot afford to come down too hard on her, but he cannot afford to appear too soft either, for fear that in either instance, the head of department will take further steps against him behind his back. He decides to see her comments against him as a sign that she has some legitimate concerns about the process of his audit, concerns which result in her feeling under pressure. This charitable interpretation enables him to approach the conversation he needs to have with her with a degree of dispassion and a degree of clarity. He decides that her slanderous comments are a wayward coping mechanism utilized by someone who doesn't like routine administrative tasks, doesn't like what she would see as interference in her department, and doesn't like him. He decides to keep his focus on his job – he is, after all, an internal supplier to her and her department –

and have what he frames in his own mind as a problem-solving conversation with her.

After presenting his report to her he informs her that he recognizes that she has made some remarks about him and his work to other colleagues, remarks that seem to suggest that she is dissatisfied with his conduct. Without pausing for breath, he then says that he would like to talk her concerns through with her. He motions towards the chair across from her desk, and when the head of department does not demur, he sits down. He asks her in an open and enquiring tone what she would like to say to him.

In framing the conversation in this non-evaluative, non-personal way he makes room for a business conversation and makes it clear that he has not taken her comments personally, even though they were clearly intended to harm his reputation and could therefore easily be taken personally. Furthermore, he invites her to speak to any issue she wants. This last point is important. The pharmacy team member does not ask a specific question of the head of department, an action which would steer the conversation down a specific route, but invites the head of department to decide what to speak about. This is a non-controlling, brave and effective way to frame the conversation. It signals to the head of department that he is not afraid of her, her seniority, or her sharp tongue, and that he is there to listen and learn. He simultaneously mollifies an unruly departmental head and impresses her.

This way of setting up the discussion goes some way to enabling the two colleagues to have a meaningful dialogue in the minutes that follow. The head of department discloses that she has little time for time-consuming administrative chores, and wants to focus her days at work around meeting customer requirements. The supplier counters, with a smile, by saying that so does he. The head of department laughs at his wry humor. From this point onwards the conversation could go down a number of paths, none of which is likely to provide the pharmacy team member with the degree of certainty he would like that the head of department won't repeat her mischievous and misleading comments about him. But his deftness of touch in handling her, and his cleverness at depersonalizing the discussion they need to have, serve him well and enable him to establish contact with the person behind the imperious façade. Whether he will subsequently be able to influence her sufficiently that she ceases slandering him behind

is irresponsible and dishonest, and who wants to discredit you and injure your reputation.

The chapter:

- Suggests that when a basically honest client displays signs of irresponsibility and lack of commitment, they are likely to be under pressure and coping badly.
- Proposes that, under these circumstances, even though your client's behavior will cause inconvenience and irritation for you, their primary motivation is to escape from their internal pressure cooker and not to annoy you, although it is highly likely that their behavior will result in this outcome too.
- Identifies a number of useful strategies to employ in these circumstances, all of which involve stepping into your client's shoes and addressing the issues that most trouble them. These issues include pointing out the discrepancy between what you were expecting them to do on the project and by when, and what actually happened, while also positioning yourself as a helpful adviser ready and able to remedy their concerns.
- Suggests that you need to understand the emotional make-up and personality of your client in order to do this effectively.
- Highlights how to handle the tricky issue surrounding a senior-level client who wants to injure your reputation behind your back, and whose irresponsibility and lack of commitment extend to lying about you and your work.
- Proposes that the most effective way to handle clients like these, clients who have significant seniority, is to approach the conversation in an impersonal way, as a supplier seeking to address a business issue, rather than framing the discussion as a more personal discussion or using anger to make your chagrin about being slandered clear.

The last chapter of the book focuses on situations in which your client has become someone you no longer wish to work with, and illustrates some of the issues involved in confronting this challenging situation. It examines what can happen when, as an internal supplier, you do not have the choice to 'sack' an internal client no matter how much you wish you could. And it explores the issues facing external suppliers who want to 'sack' their client but who face reputational damage and lost income if they do.

When Enough is Enough

Ceasing to Work with a Troublesome Client

IS THIS CLIENT WORTH IT?

Every once in a while you might be tempted to ask yourself ‘is it worth it?’ when working with a particularly troublesome client. Your client might have engaged you to work on a project you like, and might be providing you with challenging and enjoyable things to do. But the issues surrounding managing this particular customer are proving time-consuming and onerous, and you are struggling to make headway. You have tried to resolve the issues between you, but no matter how you approach it, your client isn’t open to being influenced by you, and is determined to proceed down a track that is fast becoming untenable for you. The issues seem intractable, and you are beginning to wonder if it is worth your while continuing to invest the time, effort, and energy involved in working with them.

Of course, opting out is not straightforward either. If you work in an internal supplier role you would have to provide credible rationale to your own managers – and to your client’s – to account for your decision to walk away. And, depending on the political environment in which you work and the pressures on you as a supplier, that may not be an easy task to undertake. Your managers and clients might take the view that it is your job to work with this client no matter what the provocation, and might simply require you to get on with it. Walking away, despite the aggravation, might well put you on a collision course with your own managers, as well as harming your profile with your client base and in your wider organization.

If you work in an external supplier role the stakes will be different but might be no less taxing. You might be able to walk away from the project should your level of dissatisfaction with

your client be understood by your more influential colleagues, or should you work freelance and therefore have sole discretion over your affairs. But you would have to weigh up the consequences of the loss of income, the loss of potential future work from this client, and the potential reputational damage you would incur should they speak ill of you, before making your choice to ‘sack’ your client. You might simply decide that the tension, wasted time, and ineffective project outcomes are the better options, and so continue to work with your problematic client anyway. On the other hand, you might decide that you do not want to carry on working under such provocation, and that it is not in your interests to carry out less than top-quality work, so it is best to walk away even given these potentially unpleasant consequences.

All in all it’s a difficult decision to make, and one which you cannot afford to take lightly if you think that continuing to work with your client might compromise your:

- Integrity
- Credibility
- Reputation

or all three.

So let’s explore the in and outs of just this dilemma. We will examine a variety of situations facing internal and external suppliers that you might consider to be deal-breakers. We will then look at different ways of resolving the question of whether to remain working with a troublesome client, or whether to say that this client is more trouble than they are worth and enough is enough.

DEAL-BREAKING SITUATIONS

There could be many, many different contexts within which you might ask yourself whether or not it is worth your while to continue managing a project on behalf of a particularly challenging client. Consider the following scenarios.

Scenario one

An influential insurance operations manager in a global firm wants to change the way his settlements team handles exceptions. The

new method will involve accounting for large exceptions which occur during a Friday on the following Monday, enabling his week-ending figures to look more robust. The operations manager instructs his technology team supplier to redesign the settlements software to reflect this change, but does so without having tried to secure any senior buy-in to the proposal beforehand. The technology team supplier is a straightforward character, and would normally be minded to do what any influential internal client demands. But something about the project doesn't feel right, and the more he considers it, the more he concludes that something is amiss. The paperwork does not have a senior signature on it. In fact it doesn't have any sign-off at all. The technologist can only think of one reason for this omission: that this client's objective for the project is unlikely to be aligned to any wider organizational targets. He accurately forms the view that this project is primarily about enabling the operations manager to finagle his figures.

Over a period of a few days the technologist carefully asks around, enquiring about the reputation of the operations manager, a man with whom he has had few dealings. The technologist becomes aware that the reputation of this particular client includes that of a political operator. He thinks that it could be he and not his client who takes the fall should his client ultimately be questioned about his systems enhancements by someone higher up the organization who wants an account of what is going on. The technology team member doesn't feel equipped to tackle the operations manager head on, but then he doesn't want to carry out work which is not aligned to his employer's organizational goals, and which could place him in the firing line should anyone start to ask awkward questions of his client.

Scenario two

A senior manager in a travel firm specializing in holidays to North America is experiencing a problem with the speed of his older-model laptop. Rather than invite his IT team member to look at it, determine what the fault is, and suggest a solution to remedy the problem, he calls her and demands that she purchase a specific piece of software on his behalf. The senior manager claims that the other managers at his level all have the application installed as standard on their newer-model laptops, and states his view that it provides them

with a series of advanced features as well as enhanced processing power. He then tells his supplier that he wants to have the same piece of software installed on his machine as well.

While it is true that the application in question does affect the functionality of newer-model laptops, and does indeed speed them up, it is not compatible with the senior manager's slightly older machine. The IT team member tells her client that his choices are to keep his current laptop and put up with its slower speed, or to put in a request for a newer-model laptop which would have the piece of kit he wants as standard. She adds that because all his peers have the newer-model laptop, it won't be difficult for him to get his spend approved. But, although he leaves a silence while she is speaking, the senior manager appears not to hear her. Her words fall on deaf ears as he tells her that he expects the new piece of software to be installed in his existing machine by the end of the week, a procedure which he will watch her perform. Then he swiftly concludes the telephone call.

The IT team member is confused. She briefly considers calling him back and repeating her advice in case he has misunderstood her. But then she thinks better of it. She forms the view that her client understands what she said to him perfectly well, but is simply not working with her. She decides that he has latched firmly onto a solution in which he believes, which he thinks will give him spurious sense of control in a situation in which he is minded, for reasons that are not clear to her, to mistrust her, her judgment, and her two perfectly sound and effective potential solutions. The problem is that his preferred solution will not work, as it involves the installation of the new piece of software into a laptop that cannot support the new kit technically. Her client is therefore requiring her to waste the company's money on a fix that will not work. She worries that, should she go against her own judgment and purchase the new piece of software, her client will inevitably blame her when it doesn't work. Worse still is the prospect of the senior manager watching over her as she performs the fix, something which sounds both bizarre and intimidating.

Scenario three

The finance director of a large chain of hotels is under pressure to maintain profits during a time of economic uncertainty. In

an attempt to reduce his cost base he decides that he wants his employee assistance program (EAP) supplier to cut the fee he charges the hotel chain in half. At present the EAP supplier offers a service comprising 24-hour online and telephone-based support for employees wanting to speak about a variety of issues including their finances, health, workplace stress levels, experiences of harassment or bullying at work, experiences of bereavement, and incidents of domestic violence. He explains that if he cuts his fee in half he will have to reduce the service level as well. He produces data to illustrate the frequency with which the hotel chain's employees use the range of EAP services currently on offer, including the 24-hour helpline. He explains that the hotel chain's employees utilize the full range of services offered under the current arrangements and that any reduction in service provision will inevitably affect their productivity. His argument is reasoned and convincing, and is backed up with data to prove his main assertions.

The hotel manager waits until his supplier has finished speaking. Then he doggedly returns to his theme. He tells the employee assistance program supplier that it is his job to drive down costs, and that he requires him to provide the same standard and quality of service at half the price. The EAP supplier thinks that he is being railroaded by a client who is misusing his power over him. He doesn't want to do the same work for half the price, and begins to think that this client might prove to be more trouble than he is worth.

Scenario four

A new principal takes up her position at a private college following the departure of the incumbent who had sleepily been in post for over a decade. The new principal decides that she needs to make her mark quickly to signal the new brisk style of leadership she favors. She sets about improving the college's core curriculum. After examining the existing curriculum closely over her first weekend in charge, she decides that she wants to reorganize it completely. She informs her staff first thing on Monday morning that she thinks the college's educational offering needs a radical overhaul. The new principal tells her assembled employees that she wants the core curriculum to reflect a more comprehensive variety of subjects, a variety that will enable the college's students to make selections

from a wider range of option combinations. She then contacts the freelance marketing adviser who works with the college and arranges to meet him that afternoon in her office. She starts the meeting by telling him that she is changing the core curriculum, and then describes the changes she wants to make in detail.

The marketing adviser cautions her that her wide-ranging plans will affect the perception which potential and current students have of the college, and will therefore alter the profile of the college in relation to other colleges in the area. The principal fails to be persuaded. Quickly losing her patience, she decides that she can't be bothered with what she regards as 'image-speak,' and rounds aggressively on the marketing adviser. She adopts a commanding and authoritarian manner with him, instructing him to 'just get on with it,' and tells him to design a new set of marketing materials within the month before sharply ending the meeting.

The marketing adviser thinks that he is being ordered about by someone who doesn't trust his judgment, doesn't listen to his opinion, and doesn't respect him enough to hear what he has to say. He doesn't want to disregard his gut instinct that the principal's plans require some serious thought and might go too far. But then he doesn't want to engage with her combative personality again, or simply to go ahead and do work which he thinks hasn't been thought through properly and might work against the college.

IN A QUANDARY

In each of these scenarios a supplier faces a quandary after a conversation with one of their key clients. In each case, the client in question behaves in a way that places their supplier in an unsustainable position. In fact, each client is guilty of a slightly different misdemeanor.

Scenario one

The insurance operations manager operates out of a personal agenda that is not aligned to any business objectives or wider organizational rationale. This results in his instructing his IT supplier to design and make systems enhancements for which he has no senior approval, and which he might subsequently be minded to pass off as an aberration on the part of his supplier

should he think it politically expedient to do so. The IT team member is caught between the illicit wishes of his client, his fears for his own reputation, his concerns about the political territory he is being maneuvered into by his client, and his own lack of authority in the situation.

Scenario two

The travel firm manager tries to control a situation in which he has neither the expertise nor the know-how to warrant the degree of interference he feels necessary. Instead of trusting his IT team member to find a fix for his laptop issue, the senior manager decides that she cannot be trusted, and predetermines a solution – one which won't actually work – in a spurious attempt to exercise control in a situation which he experiences as personally threatening. When the fact that his proposed solution won't work is kindly pointed out to him along with two workable alternatives, the senior manager refuses to consider either of the options presented to him, and insists on the fix he has predetermined. The technologist knows that she would be wasting the company's money should she purchase the application he wants. Furthermore, she knows that this 'fix' will fail, and fears that when that happens, her client will then blame her for mishandling the situation.

Scenario three

The finance director of a large chain of hotels emphasizes one issue, in this case costs, above all others. This results in the hotel chain director requiring his EAP supplier to offer exactly the same quality and range of services as he has traditionally done at half the usually agreed fee. The hotel chain director is not open to being influenced that his request is unreasonable. Nor is he minded to listen to the argument that his suggestion runs counter to the best interests of the employees he manages and therefore the employer on whose behalf he works.

Scenario four

A new college principal becomes wedded to her own unilaterally generated view that the college's curriculum is in need of a radical

overhaul, without thinking through the implications of such a move for the image of the college. This approach results in her failing to listen to advice from her marketing adviser which she really needs to hear. Instead of working with him she adopts a highly controlling approach to her dialogue with him. She overrules him in a peremptory manner, disregards his thoughtful and conscientious attempt to get her to think more deeply about the consequences of the actions she is proposing, and informs him of her wish that he simply do her bidding without demur. He feels disrespected and demeaned, and thinks that his integrity will be at stake should he simply follow her orders.

UNPLEASANT ALTERNATIVES

In each case these suppliers are caught between a rock and a hard place. Their clients:

- Will not listen to their counsel.
- Are taking a line that is in neither their best interests nor the best interests of their employer.
- Require their supplier to take actions which they consider to be unwise or unworkable.
- Want their supplier to disregard their own better judgment and do their will anyway.

The question for each supplier to grapple with is, at what point do they say that enough is enough and draw the line? Does the supplier:

- Remain of the belief that they are the best person to advise their client even in these trying circumstances, commit to continue to act in the best interests of that client, re-engage with them and try again to influence them?

Or:

- Decide that this client is not a good client to have and cease working with them in the case of the external supplier, or in the case of the internal supplier, escalate the matter upwards?

In none of these situations is this decision clear-cut. So let's explore each one in more detail. We will set the scene by examining what is going on in the minds of each of these clients that could account for their approach to their suppliers, and then go on to explore the ins and outs of the decision facing each of the suppliers.

FROM A CLIENT'S PERSPECTIVE

From a supplier's viewpoint each of the clients in the above scenario is out of line, some of them to a greater degree than others. But from the client's viewpoint, each of them has good reason to behave as they do. Let's take a look at the factors which are uppermost in their minds and which account for their troublesome conduct.

Scenario one

The global insurance firm's operations manager is a devious and manipulative character. He feels frustrated by what he sees as a somewhat mundane role out of the spotlight, managing settlements processes. And he resents working with team members who he regards as humorless and unadventurous. Having said that, he is also a lazy character who has become more and more fed up at having to justify an increasing number of larger exceptions to his bosses, people who he thinks lack vision and are too quick to jump on his team's occasional errors while not being quick enough to praise him for his efforts. He notices a pattern of larger exceptions appearing on a Friday. This trend results in his Friday afternoon meetings with his director being unnecessarily tetchy, as his boss confronts what he regards as the operations manager's sloppiness and lack of application at managing his team towards the end of the week.

Instead of taking it on the chin and working with his team to eradicate the errors, the operations manager decides to handle things in another way. He determines to hide the evidence from his boss, at least as far as the Friday afternoon meeting is concerned, by removing the need to account for larger Friday exceptions until the following Monday. This leaves him free to speak with his boss each Friday afternoon without having – as he sees it – to provide an onerous and tedious explanation to account for a large exception

on that day. By the following Friday meeting Monday's exception will have been resolved – or otherwise managed by him – and he will be free to meet his boss and present the week's figures without any undue fuss and hullabaloo.

In order to put his plan into effect, though, he needs to amend the system, and that means he needs to involve the technology team. Normally he would present the technology team with paperwork that includes the signature of a senior member of the firm. But in this case he cannot, so he simply provides a verbal brief and some paperwork without the required signature, and leaves his technology colleague to get on with it. He cannot come clean and tell his internal supplier what he is up to, because this is more about manipulating the figures than any true systems enhancement. So he hopes that his more factual and less underhand colleague will not understand the significance of his deviation from the normal process, and will simply apply himself to the work anyway.

But his technologist does realize something is up, and worse still from the operations manager's perspective, he realizes exactly what is going on. However, his intuitive understanding of the real reason behind the 'systems enhancement' creates quite a conflict for the uncomplicated technologist. Unused to handling sly and slippery colleagues, he recognizes the professional danger he is in if he goes ahead, and the equal professional danger he is in if he doesn't, and he simply doesn't know what to do for the best. His options, as he sees them, are to escalate the issues upwards, which risks incurring the wrath of his cunning client, or to perform work which he knows does not have wider organizational backing and ought not to be performed. Neither option sits comfortably with him.

Scenario two

The senior manager in the insurance firm is a man who finds any change difficult. Promoted for his technical proficiency and not for his leadership ability, he experiences the level of seniority associated with his role as onerous, and finds the interpersonal ambiguities and political undercurrents of life at the top of his global organization uncomfortable. He regularly experiences his working life as one in which he has too little influence and too much to do. The one thing he can control is his equipment, and in

particular his laptop, which he regards as being essential to him. It goes everywhere with him, and he relies on it for every aspect of his work. His diary, his email, his spreadsheets, his contacts list, his documents, and his plans are all on his laptop. Having access to it 24/7 is vital to him. The mere thought of losing access to it for a short period of time while, for instance, going through an airport security check fills him with anxiety.

Of course, displacing his professional and personal anxieties onto his laptop doesn't help him resolve any of the fears he has about being in an exposed position at the top of a ruthless hierarchy. But it does give him a mechanism by which to contain his fears as long as his laptop is functioning effectively. However, the senior manager becomes concerned that his laptop isn't functioning speedily enough. On comparing notes with several of his peers he discovers that it does not have a new application on it which improves its functionality, and which comes as standard on the slightly newer models that they possess. He decides that he must have the new software installed on his machine, a move which would obviate the need to buy the newer model laptop. He does not want to take what he perceives as a significant risk: that he might lose data when switching his files, folders, and email addresses over to a new machine. His preferred solution meets all his internal criteria: he won't lose his laptop or its data, he won't have to learn anything new, he can control what will happen next, and how it will happen.

He is completely unprepared for his IT team adviser's response. He hears her say that the software in question won't work on his current laptop and that he might want to consider buying the newer machine which carries it as standard. This information leaves him with two unpalatable choices: cease using his current laptop and risk losing the data on it as it is transferred to the newer model – and no matter how remote a possibility this is in reality, it is real and likely in his mind – or continue to work with a slower machine. He doesn't like either of these two choices, and is instantly annoyed with his internal supplier for not being willing, as he sees it, to work with him and do what he wants.

Being a status-conscious man in a status-conscious company, he does not want to lose face and back down in his conversation with her. Unable to express his disappointment at the news he is being given, or to explain to his supplier that he is worried he will lose

data if he buys a new laptop and transfers files between the two machines, he does the only thing he can think of. He formulates a strategy that will retain him control. He ignores the advice he has just been given by his IT supplier and, creating the impression he mistrusts her advice, he insists that she do what he wants her to do even though he has already been informed by her that his strategy will not work. He orders her to install the new application on his machine while he watches, and then he ends the call.

To the IT supplier this is a nonsense that sounds both baffling and threatening. She briefly considers calling him back in case he has misunderstood her, but then realizes that he can't have. She hears his desire to watch her perform the fix as a desire to check up on the quality of her work, and thinks she is dealing with a completely unreasonable, potentially bullying senior manager, a state of affairs which leaves her wanting to walk away from the work but unable to because it is for such a senior figure. She cannot envisage stalling for time either, and feels trapped. The IT adviser is by no means unassertive, but in this situation, she simply doesn't know what to do for the best.

Scenario three

The hotel chain director is under pressure to cut costs, and knows that the hotel chain cannot afford to maintain its current level of expenditure. He is not a good manager or influencer. Nor is he an able leader. He handles his staff and his hotels by issuing directives, considering the facts in any situation, and paying close attention to the costs associated with any course of action. His business is struggling in an economic downturn and the hotel chain director is feeling the strain. He experiences the challenge of keeping his hotels maintained and productive as an onerous one. He is out of touch with his own feelings and in denial about the degree of stress he is under. He believes that, under pressure, reliable performers try harder, and to be fair to him, he does practice what he preaches and does put in long, hard hours at work.

However, his inability to relate to his own feelings of strain results in him being unconsciously disrespectful towards those of his employees who are under sufficient stress that they decide to utilize the hotel chain's EAP. He simply does not understand the need to do so. Not only does he see the EAP as a nice-to-

have, he secretly thinks that only weak-willed people would need such a thing. He doesn't understand that when an employee is under strain and makes use of the EAP, their performance will likely remain effective, but when an employee is under strain and does not have access to an EAP, their performance might suffer. He doesn't readily make any connections between how his staff members might *feel* and how they might subsequently *perform*, and he sees the EAP only in bottom-line terms.

So when he is faced with a pressing need to cut costs, he thinks it entirely reasonable that a nice-to-have service like the employee assistance program should come under scrutiny. He asks his supplier to cut his company's fee in half. He doesn't recognize the value of the service to the hotel, and being poor with people, doesn't respect the difficult position in which his demand places his supplier, or the potential dip in morale that his decision could cause among the proportion of his workforce who use the EAP. He simply thinks that his most pressing need, to cut costs, is justification enough for the course of action he proposes.

To his supplier this line of argument is unreasonable at best. He counters with arguments about the value for money his service represents and how accessing the EAP maintains productivity among the staff of the hotel. But he quickly finds that his client is not remotely interested in either of these assertions. If he is to stand any chance of influencing his client, the supplier needs to address the one key issue as the hotel chain director defines it: his pressing need to reduce overheads at a time of economic downturn. Only arguments that demonstrate a clear understanding of the hotel chain director's desire to reduce costs will gain the EAP supplier the hearing he wants. The decision he needs to make is whether or not he wants to have that conversation, given that it would inevitably mean that his company has to cut its fees.

Scenario four

The new college principal is an ambitious and determined woman who is great at driving change but not so good at thinking it through or at taking people with her. In this case, she fails to consult the marketing adviser who works with the school, or her own staff members, who she thinks have grown too comfortable under the more undemanding leadership style of her predecessor.

She simply makes a unilateral decision to make wholesale changes to the core curriculum without listening to any opinion other than her own. This is a bold step to take but not a particularly wise one, and it backfires on her. It is not that she thinks that her colleagues and other advisers have nothing useful to say, although her actions could be interpreted in this light. It is more that she thinks she needs to act rapidly and decisively if she is to galvanize the college along a more productive path.

When she meets the marketing adviser she only has one thing on her mind, which is to gain his enthusiastic endorsement for her plans. She is completely unprepared for his reticent comments that she might have misjudged the locality and the college, and might need to think again. Unused to being advised that her thinking is wide of the mark, and realizing that she is indeed guilty of acting in haste, she digs her heels in rather than lose face. She reacts to the well-judged and well-intended comments of the marketing adviser as if they were undermining comments. She is inwardly kicking herself but is also completely unable to handle her own emotions. On the one hand she does not want to set herself up to fail by ignoring what she is being told. On the other hand she does not want to back down, having already told her staff of her plans. Caught between her pride and her fear of failure she mishandles the moment, and becomes imperious and commanding.

The marketing adviser has never met her before, and has no previous experience of her by which to judge her present conduct, her character, or her mood. He genuinely wants to provide her and the college with the best advice he can, and he genuinely thinks that she needs to slow down and consider the impact of her plans in more detail. Secretly, he thinks she has completely failed to consider any of the marketing or promotional issues associated with changing the college's core curriculum, and he does want to work with her to resolve the situation. However, her overbearing reaction takes him completely by surprise, and he cannot find a way of soothing her sufficiently that she will calm down and hear him. He realizes that, given the level of emotion she has suddenly injected into the meeting, this is likely to be his one chance to retain her as a client. And judging by her temper and conduct, he isn't at all sure that he wants to work with her if she is going to be so difficult a character to manage. He is at a loss about what to do, and in the moment available to him before she commands

- Against the true interests of their client.
- Against the best interests of their client's employer (who may also be their own employer).
- Or all three.

FROM A SUPPLIER'S PERSPECTIVE

So let's take a deeper look at the dynamics at play in each of the four scenarios from the point of view of the suppliers, and examine the factors that they need to be weighing up as they make their decision about how to proceed.

Scenario one

The technologist finds himself in the middle of the morally ambivalent operations manager's attempts to manipulate his exceptions figures. The technologist is no fool, and is far more astute than his internal client gives him credit for. But he is also out of depth interpersonally and politically. Recognizing what is going on is one thing; knowing how to handle it more safely rather than less safely is quite another. The technologist has a positive relationship with his own boss, but he is also aware that escalating the issue to her would effectively take it out of his hands and place it into the hands of whomever his boss subsequently discusses it with. While he doesn't think that anyone in the technology hierarchy would deliberately act against him, he is not so sure that the operations manager wouldn't do so. He might become sufficiently embarrassed to try to even the score, or simply to shift the blame onto him. The technologist thinks that it would be better for him to sort things out with his client himself.

The question is: how to do it? The issue for him is one of integrity. He cannot proceed with work he knows is not sanctioned by a senior manager, and which is dubious in its inception. To do so would compromise his own standards. But, on the other hand, he does not want to alienate the operations manager, who is a tricky character, and who could negatively affect his reputation with a wide variety of other colleagues. The pivotal issue, and the one which alerted him to the underhand methods of the operations manager, is the absence of a senior sign-off to the project. So this is where he decides to start. He arranges a meeting with the

operations manager, and begins by saying that he understands that the project doesn't have senior sign-off. Highly aware that this way of starting the meeting will not be what the operations manager wants to hear, he immediately follows this up by saying that he is forbidden from proceeding without the signature of a senior manager. Then, using the same conciliatory and evenly paced, non-judgmental style of delivery, he suggests that the operations manager might like to speak with his boss in technology and smooth things over with her so that the project can start on time. He then stands up and, telling the operations manager that he knows he is busy and doesn't want to take up any more of his time, says that he will wait for his manager to give him the green light. Then he leaves.

This approach is clever. It simultaneously achieves two things. First, it preserves the delicate balance between him as supplier and his customer as client, even as he is refusing to progress the project. Second, it enables his client to save face, at least towards him. At no point does the technologist embarrass his client by confronting him directly over what he is doing. At no point does he display any obvious ire at being manipulated. Nor does he pass any verbal judgment on his client. At no point does he say that he cannot or will not have a part in a dodgy project. At no point does he give his client any reason to feel antagonized, annoyed, or disrespected. Instead, he respectfully suggests a way in which the project can proceed, a way that requires the operations manager to speak with his boss in technology. Setting things up this way means that the issue of whether the project does or does not start is now with the operations manager. It is no longer with the technologist. It means that the operations manager is now responsible for whether or not the project proceeds, and if it is to proceed, he must clear it with a more senior technologist than the technology team member. And that cannot easily happen, as they both know only too well.

The technologist has neatly stepped out of the trap laid for him by his unscrupulous colleague, and can now, should he wish, inform his boss about what has happened. Or not. All in all, this low-key non-confrontational conversation works well for him. It preserves his integrity, results in a dodgy project being sidelined, and enables the technologist to maintain a productive relationship with a client who, had he alienated him, could pose a significant danger to his reputation.

Scenario two

The IT team member is a relatively junior employee in a hierarchical and old-school insurance firm. She is highly aware of her lack of status in the firm, and of the fact that she is dealing with an unreasonable and authoritarian senior manager. She feels trapped having been summarily ordered to perform a fix which she knows won't work by a manager who also expresses a desire to watch her do the work. She thinks she is in danger of being bullied, and feels powerless to prevent one of two unpalatable outcomes: either she must perform a fix which she knows won't work and compromise herself in the process, or she has to refuse to perform the fix and incur the wrath of a strict and controlling senior figure. The IT team member does not have a positive working relationship with her own boss, whom she experiences as unsupportive and lacking in skill as a leader. She briefly considers escalating matters to her, but quickly decides that it would not be in her interests to bring her boss into it. She steps back from the concerns whirling round her head, and looks as dispassionately as she can at the situation she finds herself in.

She decides that the best way to handle the situation is to try to meet the real underlying need of this troublesome and potentially abusive internal senior client. That need is for him to have a speedier laptop as soon as possible without jeopardizing the integrity of the data and material on his current laptop. She thinks the best thing to do is to offer to transfer the data from his current laptop to a new laptop, which she will purchase for him, and to suggest that he observe her while she does so, specifically so that he can learn how to perform this procedure for himself. She sends her client an email suggesting this solution. In it she tells him that she could show him how to transfer data between the two machines so that, should he find himself in a similar situation in the future, he will know how to proceed. She picks her words carefully, aware of the sensitive nature of the prickly senior manager and of the thin ice on which she is skating. She is conscious that, given the character she is dealing with, should things go against her she risks her job.

But rather than take any other course of action and compromise herself, she decides to do what she believes is right by her employing organization, her client, and herself, and see what happens. She is fully aware that her senior client might not want her to purchase

a new laptop for him, or to transfer his data from the old machine to the new one.

Her internal client does not reply to her email. Instead, he calls her to inform her that she is not authorized to sanction any spend for a new laptop for a senior manager, and that he will refer the matter to her manager. The IT team member fears the worst. She does not expect her manager to support her, and expects there to be a lot of noise and discomfort generated around the issue. Lacking support and lacking seniority, fed up of the stifling and risk-averse culture of the insurance firm, she decides to resign and look for employment elsewhere. She knows that in taking this step she has preserved her integrity and can leave with head held high, although she is now faced with the prospect of an indefinite period of unemployment before she finds an alternative role elsewhere.

Scenario three

The EAP supplier has to decide whether he is prepared to offer the same standard of service to the hotel chain at half the price. He quickly decides he is not. His pride precludes it. His integrity precludes it. And sound business sense precludes it. In the split second it takes him to make up his mind about this set of core issues, he is then faced with the next set of related issues: what could he realistically expect to gain from negotiating with such an intransigent and unreasonable client? The hotel chain director has told his supplier that he wants the same quality of service but at half the cost.

In weighing up the situation the EAP supplier needs to keep in mind the stark reality that arguments which will likely influence most clients – such as the fact that employees who use the EAP perform better than those in the same adversity who don't have access to such a service – are unlikely to hold much sway with this particular client. His assessment of this hotel director is that he is largely unable to make the connection between how supported his employees feel, and consequently how effectively they perform. His assessment of this hotel director is that he is only interested in one thing: saving money. He decides that if he is to have any chance of keeping the hotel chain's business, he will need to provide his challenging client with what he says he needs most at the moment: substantial savings. While mulling this over, he decides that it

is not in his best interests to try to shift the conversation onto other ground such as perceived value or price comparisons with other EAP suppliers. He doesn't think that his client will follow him there. So he decides that he only has one simple decision to make: at what fee level will he walk away from this business, and in what position will the loss of this piece of business leave his own company? His decision is about whether he thinks it will be worth it for him to invest time and effort in handling this client, coming to an agreement with him, explaining to his staff that they will offer the same service but for less income, managing their reactions to this news, ensuring that they are motivated enough to keep their standards up, and finding other business to replace the lost income. It is a simple and clear, but potentially brutal, reality for him to grapple with.

He decides that, even though his firm has done business with the hotel chain for many years and has provided them with a service which they have valued, he cannot be sure that in one or two or six months time he won't be having the same conversation again. He decides that to accept a significant fee reduction would undermine his own company and demotivate his staff. The time and effort which would go into managing this client and the impact of a significant fee reduction on his own employees' morale would be time better spent looking for other more profitable business elsewhere. He decides that it is time to move on and find another client to replace this one, a client who has a more optimistic view about the benefits of offering an EAP to their staff. He declines to provide the hotel chain director with the same service at half the fee, and tells him he is not prepared to invest time in negotiating with him. He explains that his service offers great value within its current price structure, and thanks him for his business. Then he ends the meeting and walks away.

Scenario four

After his meeting with the college principal in her office the marketing adviser is very much on the back foot. He was completely taken by surprise by his new client's manner, and rues the fact that she left the meeting without his having managed to influence her at all. In fact, if anything, she walked out of the meeting having created the impression that she had no time for him or his point of

view. Being ordered by a new client to ‘just get on with it’ is not a good start, and the marketing adviser feels his failure keenly.

However, the marketing adviser is a tenacious supplier and confident in his own abilities. He is not easily dissuaded from his task of offering the best service he can to his clients. He refuses to consider walking away at this juncture, although he accepts that he might have to do so should he be unable to find a way to get this client back to the table ready to have a productive dialogue with him. He decides that his key and most pressing task is to win the respect of this most troublesome of customers. He mentally steps back from the situation he is in, and assesses his options. Given the level of emotion introduced into the meeting by the college principal, the marketing adviser decides that the least productive thing he could do would be to try to reopen the discussion with her directly, for fear that she would react in exactly the same way. Instead, he thinks a better route would be to provide her with some data from other colleges who have made wholesale changes to their core curriculum, so that she can evaluate the situation for herself and come to the conclusion on her own that her plans need more thought. He also decides that the level of upset she displayed at the meeting can only be inspired by fear, fear that she has indeed overstepped the mark and made a misjudgment. And he decides that, because she is afraid, he does indeed have a chance of influencing her if he handles the meeting in the right way.

He decides not to tell her that her plans won’t work, that she needs to pull back from them, or that she has misjudged the moment in formulating them without any other input. He thinks that, deep down inside, she knows all these things and doesn’t need to hear them from him. Furthermore, he humbly decides that he hasn’t earned the right to give her any of these messages, having only been in one meeting with her, a meeting that did not go at all well. So he sends her an email saying that he would like to meet with her the following morning and help her find a productive way of putting her core curriculum plans into effect. He does not tell her that he wants her to re-evaluate her plans, only that he wants to help her achieve them.

The marketing adviser decides to use the meeting to achieve three positive aims. First, he wants to help his client step back from the urgency of her plans and calmly think through the promotion and marketing issues generated by the core curriculum changes

dynamics inherent in making this choice. It demonstrates how some client relationships can be salvaged but others can't, especially if you consider that your integrity, reputation, or credibility is at stake. The chapter:

- Suggests that while the client is always the client, occasionally some clients are more trouble than they are worth.
- Proposes that making the decision to cease working with a particular client is never straightforward or easy, but sometimes it is the best option, especially if your client is determined not be influenced by you, wants to impose unreasonable conditions on you, or is likely to misuse their greater organizational authority over you to make trouble for you.
- Identifies that the core decision you need to make when faced with a client like this is how long you are prepared to remain committed to them and their best interests, and at what point you want to draw the line and end the working relationship or escalate the issues upwards.
- Highlights a number of situations in which the decision about whether or not to cease working with a client is not clear-cut and is a matter of individual conscience.

Final Thoughts on Managing Challenging Clients

Your Client-Management Skills

My aim in writing this book is to give you some tools, skills, insight, and tactics which will enable you to work for, with, and alongside your most challenging clients as productively as possible.

The ideas in this book are proven and will work. But it is your ability to handle your awkward, obstreperous, and difficult clients in the moment of their behaving in awkward, obstreperous, and difficult ways that will mark you out as an excellent rather than an average, or even a not that good, supplier.

It is your reading of your client's character and personality, your application of your knowledge, wisdom, and interpersonal know-how, and your willingness to put your client's welfare at the top of your priority list that will make the difference to the quality of the relationships you build with them day in, day out.

I hope that reading this book has given you some new ideas, some fresh perspectives, and some workable strategies. Above all, I hope that the time you have invested in reading this book will enable you to put your energy and enthusiasm towards the parts of your work that you most enjoy, so that less and less of your time and effort gets dissipated in ineffective responses to your most challenging clients' troublesome and difficult behavior.

Aryanne Oade

To tell me about your experiences of managing challenging client situations, or to explore options to develop further skills in these areas, please visit www.oadeassociates.com, from where you will be able to contact me directly. I look forward to hearing from you.

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