

Working with Clients

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Is this a good match?

— [**Know Yourself**

— [**Know the Client**

Know Yourself



Strengths



Weaknesses



Ambitions



Style of working



Goals

Know the client

— [What do you think Google is for anyway?

— [Interview the client

— [Ask other consultants

— [Pay attention to what you see in the office

— [Listen to the employees, watch their attitudes

— [Ask other vendors you encounter on the job

Bottom line?

- [The people at the Genius Bar have to work with whomever walks through the door. You don't.
- [And you shouldn't.

Who's a lucky client?

- [Set up communications the way you want them to be
 - Explain how you work
 - Discuss rates, scheduling, expectations in advance
 - Create expectations that match what you're willing to do
 - Take notes and show that you're paying attention
 - Ensure that you're getting needed feedback

Who's a lucky client?

- [Communicate about money

- Be honest about what your costs will be
- Be sure you know who you should be talking to
- Alert them to future expenditures
- Work toward getting IT expenditures as line items
- Explain when decisions impact costs

Who's a lucky client?

- [Communicate under stress
 - Address issues right away
 - “One more thing” is a distraction and you want to be sure they understand why, but you’ll come back...
 - Ensure that there is appropriate understanding for what you’re doing
 - Teach gently, everyone is an expert at something

Who's a lucky client?

— [Speak English

- Tech is confusing and ever-changing
- If you sound superior, I'd fire you and they might
- Don't brag, they'll know if you're good
- Share stories that show you're on their side

A proposal! Wow, nice ring!

—— [Make sure to get a complete view of what needs doing

—— Listen

—— Learn

—— Test your knowledge

—— Plan resolution of the issue(s)

A proposal! Wow, nice ring!

- [Take notes

- [Understand their business, goals, wishes

- MBA? Seriously...

- [Document your plan with realistic time and cost estimates as well as factors that will affect your work

- [**DEFINE CLIENT EXPECTATIONS** (yes that's in caps)

Your work environment

- [Define client expectations
- [Listen and respond to their needs
- [Keep a steady course while madness surrounds you
- [Use your insight to help them define goals
- [Be patient when reality isn't yet recognized

Your work environment

- [Keep taking notes...
- [Determine goals and seek confirmation and priority
- [Seek to identify the real source of antagonism
 - Fear? Technophobic? Lack of respect? Bad day?
- [Stay within the boundaries of your agreement or seek a renegotiation

When excrement meets fan

- [Remain calm, stress is contagious, it WILL all work out
- [Communication is key, as always
- [Ensure you have access to the decision makers you need
- [Their concept of an emergency may not match yours
- [Seek help from an expert if you're stuck
- ["I don't know but I'll find out" is valid and respectable

Have that in writing?

- [Documentation

- I knew a guy with an eidetic memory... Good for him, bad for everyone else

- [Configuration notes

- [Vendor and service notes

- [Job notes

Have that in writing?

- [Keep in a format that can easily be given to client
- [Narrative form helps understanding
- [English is nice
- [It's your a**, it's up to you to cover it

Security

- [Take time to educate

- Passwords, password strength, 3rd party tools
- Keychain.app, Encrypted Disks, PDFs, databases
- Practice what you preach
- Demonstrate
- Help create and enforce security policies

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