

# An Experts Guide to 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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