



Introduction

Whether you are working with a new client or existing client you want to ensure you have a quality relationship with them. Even if you have an excellent standing with your client, you may want to see if you can improve it. Following some simple guidelines can either get you started or help you improve your client relationships.



Module goals

This module discusses steps you can take to create a quality relationship with a new client or improve your relationship with current clients.

This module takes 25 minutes to complete.

After completing this module, you should be able to:

- Explain how to partner with decision-makers, especially at the c-suite level.
- Identify how to connect with the client to identify a need or drive a solution.
- Describe how to use listening skills when working with a client or partner.
- Recognize when you need to ask for targeted assistance from others.

Module topics

Select any topic to continue.



Collaborate with the client
5 minutes



Connect with the client
5 minutes



Work with the client
5 minutes



Requesting help
5 minutes



Check Your Knowledge
5 minutes

Resources

To learn more about **Building Quality Relationships**, check out the following link:

- [Exploring the inner circle Black Deck \(PowerPoint\)](#)
- [Exploring the inner circle Insights from the Global C-suite circle \(PDF file\)](#)
- [Consulting Fundamental: Effective Communication Skills \(PowerPoint\)](#)
- [Global Blue Consulting Listening Skills \(Web page\)](#) (Click Learn About at top right of screen, select Listening Skills)
- [Leverage the Decision-Making Styles of Others \(Video\)](#)
- [Build and Develop Strategic Business Relationships \(Video\)](#)
- [Advice and Credibility Go Hand-in-Hand for Managers \(PDF file\)](#)
- [How to Ask for Help at Work \(PDF file\)](#)



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Ralph Belfatti

Collaborate with the client

The need for strong client relationships

Collaborating with your client stakeholders leads to building strong relationships with clients. Which, in turn, can lead you to being able to influence your client’s decisions, break down the barriers, and collaborate inside and outside of the organization with your clients.

Connecting with a client can be difficult as many times c-suite and client executives have very little time in their schedules to meet with you. To make better decisions, executives require the most accurate information possible and in a timely manner.



Quality relationship characteristics

Collaboration is not the single criteria to building a quality relationship with a client, you must also have honesty and mutual trust.

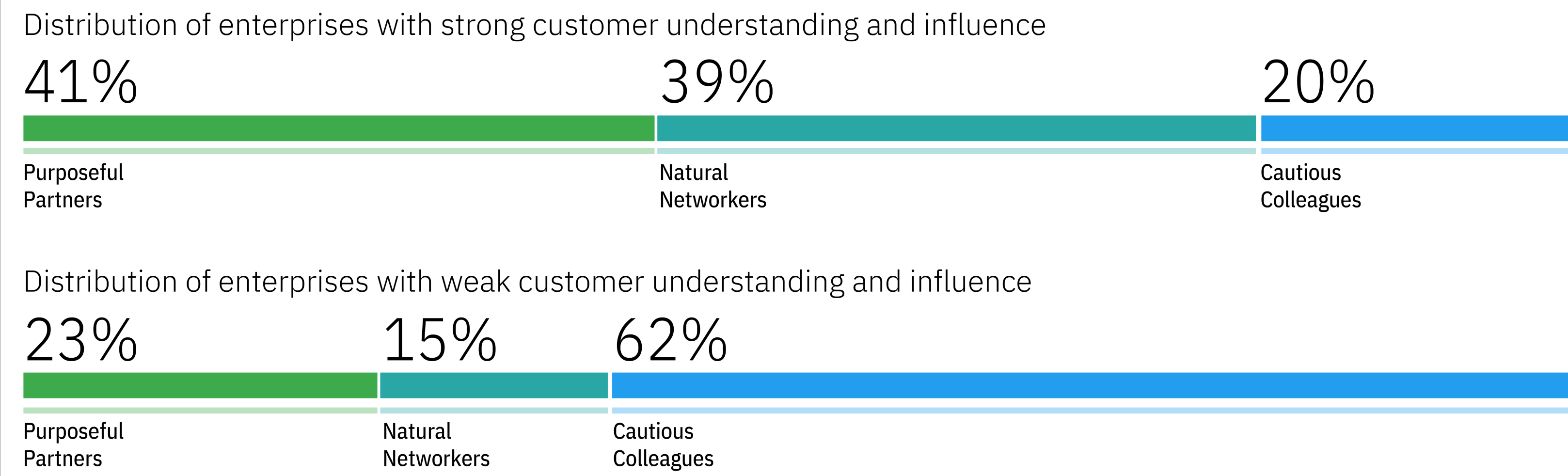
You and your client executives must have a shared strategic vision and be comfortable with each other. However, you don’t want to become too comfortable with each other as that could stifle healthy tensions, fresh ideas, and different perspectives which are all part of innovation.

Collaboration styles

Research has recognized three different collaboration styles for individuals and teams. These are cautious colleagues, natural networks, and purposeful partners. Refer to the table for a description of each style.

Collaboration style	Individual or team characteristics
Cautious colleagues	Collaborates warily with their clients and is usually dictated by the type of industry
Natural networks	Already collaborates to a great extent with the client and does not plan to form deeper partnershins with the client
Purposeful partners	Uses collaboration as the means to drive innovation, usually has a specific goal in mind, and expects to network with the client to create a competitive advantage for the client

While being a purposeful partner is ideal, both natural networks and purposeful partners understand their customers. They are open to their client’s influence. However, of these two, the purposeful partner can take this understanding of the client and convert the client’s objectives into dollars.



Source: Exploring the inner circle Insights from the Global C-suite Study

Connect with the client

Communicating effectively

As a consultant collaborating with your client, you depend on your communication skills to be successful. If you are not effectively communicating with your clients, you are likely to miss opportunities. Effective communication is not just about writing, speaking, or listening – it is also about connecting with your client. There are several communication skills; if you can master them, you will ensure you are effective at all levels of communication.



real feedback from IBM clients and Partners on what works.

Deeply listen

+

Interpret non-verbal cues: When meeting face-to-face with someone, approximately 55% of communication is non-verbal. Non-verbal communication includes facial expressions, posture, and gestures.

This isn't just being aware of your non-verbal cues but watching the non-verbal cues of your client.

x

Expectation management: Be very clear about what is to be delivered, in what timeframe, and the results expected. This includes being clear about any issues that may arise. If there is a problem or the potential for a problem, communicate it with your client. Make sure you can honor your commitments and don't overcommit.

x

Productive push-back

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Be concise: Get straight to the point and be careful when using any communication medium. Remember, both words and phrases have meaning.

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Confidently state your value and differentiation

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Know your why: Know why you are communicating with your client, and make sure your tone, word choice, and delivery are consistent with this reason. A call to action isn't necessarily a physical action, such as completing a task or setting up a meeting; it could be a non-physical action, such as leaving a client meeting with a positive feeling that your project is on the right track.

x

Decision-Making Styles

Let's reflect.

You have been learning about the importance of developing a strong relationship with your client. Do you feel you have a strong relationship with your client, or are there areas you think you could improve? Reflect on what you have learned in this module and other modules, such as the personal and professional power modules.

Now, take a couple of minutes to reflect on the value you bring to your relationship with your client and identify what communications skills you may need to develop or enhance. This is not an elevator pitch, rather an honest reflection of where you feel your strengths and weaknesses are in your communication skills.

Finally, type in a statement based on your reflection in the text block below and then download the text file for your personal use. Any information you enter in the text box is for your personal use and will not be seen by anyone else.

Type your answer in the box below.



Building Quality Relationships



Work with the client

Linguistic mirroring



When working with a client, one of the most important skills you can have is the ability to listen. You will quickly and easily earn the trust of your stakeholders by actively listening to what they have to say.

When you pitch to a client or present to an executive with whom you have a preexisting relationship, you already have insight as how the client thinks, reasons, interprets, and processes evidence. Having this insight enables you to tailor your message and copy the client's communication style. This ability is called linguistic mirroring.

Decision-Making Styles

Watch the Leverage the Decision-Making Styles of Others video, which shows an example of how not listening or learning about your client's communication style can be a deterrent to winning the client's business.

Select the **Play** icon to learn more about decision-making styles



Select [here](#) to view this video's transcript.

Find common ground with your client

As mentioned previously, linguistic mirroring is one method to use to gain trust with your client. Another method is to find common ground with the client. This doesn't mean just in the work environment; you could potentially have personal common ground.

Select each tab to learn more about the different ways to find common ground with your client.

Common
link

Indirect
link

Contact

Genuine interest

A contact, for example, your client likes going to museums to view paintings, but you do not. However, your significant other does have an interest in fine art, and you accompany them to museums.



Build credibility



Advice and Credibility Go Hand-in-Hand for Managers

If you have an agenda, you're taking the wrong approach.
by David A. Garvin and Joshua D. Margolis

Another vital aspect of working with a client is to be credible. Let's look at how to lose credibility first. Have you ever worked with someone who continually asks for advice from others but never takes it or explains why they didn't take the advice or is persistently negative about choices made by others? Do you feel you can trust this person? You would not consider this person to be credible.

On the other hand, how do you feel about the person who follows your advice or explains why they may not follow it? Give people credit for work they have done or look to understand a situation before speaking about it. This person is building credibility and is more apt to become a trusted advisor to the client.

Read the following article by the Harvard Business Review, which provides two examples of credibility. The first example shows how the head of a business unit potentially ruined his credibility and how it affected his working relationships. The second example shows how an executive created credibility with her colleague.

[Advice and Credibility Go Hand-in-Hand for Managers](#) (Note: This link takes you to a search result page, click the Advice and Credibility Go Hand-in-Hand for Managers link. If the PDF file

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Requesting help

Realize you need help

You are working with your client and realize you need help. You're concerned that if you ask for help, your colleagues and supervisors might think you do not know your job. This won't happen if you approach asking for help in a logical manner.

How do you ask for help? Begin by doing a self-assessment of your current knowledge.

- First, determine what you know. This will give you a starting place to figure out what you don't know and what you need to ask. Be thorough and honest to yourself about what you do or do not know.
- Second, determine if you can find the information yourself by researching project folders and documents, emails, or the IBM intranet. While you don't need to look at every document, you must make sure you do conduct a thorough review of the documentation.

Once you've completed the self-assessment and determined that there is still a gap in your knowledge, only then should you ask for help.



Who to ask for help

Now that you have determined you need to ask for help, who do you ask? If you don't know, you may need to reach out to colleagues or supervisors to ask for names of individuals who may be able to help you.

Once you have a name or several names, ask yourself who is the best person to answer your question. Now, ask yourself if this is the correct person to help you. Be truthful to yourself and be objective. The person you initially think can help you may not be the best choice. You may be able to ask someone in a lower band level to get the help you need. Generally, you should try to start with the lowest possible band level when asking for help. If that person cannot assist you, they will definitely point you to someone who can.

Organize your thoughts

Now that you've determined who to ask for help, you need to organize yourself.

- Next, decide when it is the best time to ask. Put yourself in the other person's shoes and take consider the person's workload (if you know it), time zone, work schedule, and preferred method of communication. If your choice doesn't appear to have the time, you may need to select another person for help.
- You now need to determine where to ask your questions. Look in w3 and find the person's preferred method of contact and proceed accordingly.
- Finally, before contacting the person, write down your questions. Aside from asking your original question, try to think of other questions you may want to ask. It is always better to ask several questions in one communication rather than in repeated follow-ups.



Receive help

Don't assume the person will be able to talk to you. In the initial contact, aside from introducing yourself, provide a short explanation of why you are contacting the person, and then ask the person if there is time to talk to you and answer your questions.

If the person you contact cannot meet with you, they may have a report or collateral documentation that will answer your questions.

If you do have a meeting, make sure you share any information you already know, what you found out during your research, and why you are asking for help. During the meeting, ensure you understand the responses to your questions and write down any information you receive that you need to remember. Once the meeting is over, show your gratitude by thanking the person for the help and offering your assistance if they need help in the future.

Building a quality relationship with your client doesn't happen overnight. You need to build credibility with your client and connect with them through collaboration, honesty, building trust, and asking for help when needed. Using what you've learned in this module will go a long way toward your client seeing you as a trusted collaborator having their best interest in mind. This promotes a win-win situation. IBM gains or maintains a valuable client and the client gets the





Governance plan

What is a governance plan?

The governance plan, or G plan, is used to help you identify project priorities that need to be communicated throughout the life of the project. This plan is robust enough to launch the project and keep it on track through the end of the project.

As you develop the governance plan you need to keep in mind the components of governance and the value of having a governance plan in place.



Select each tab to read more about governance.

Characteristics of governance

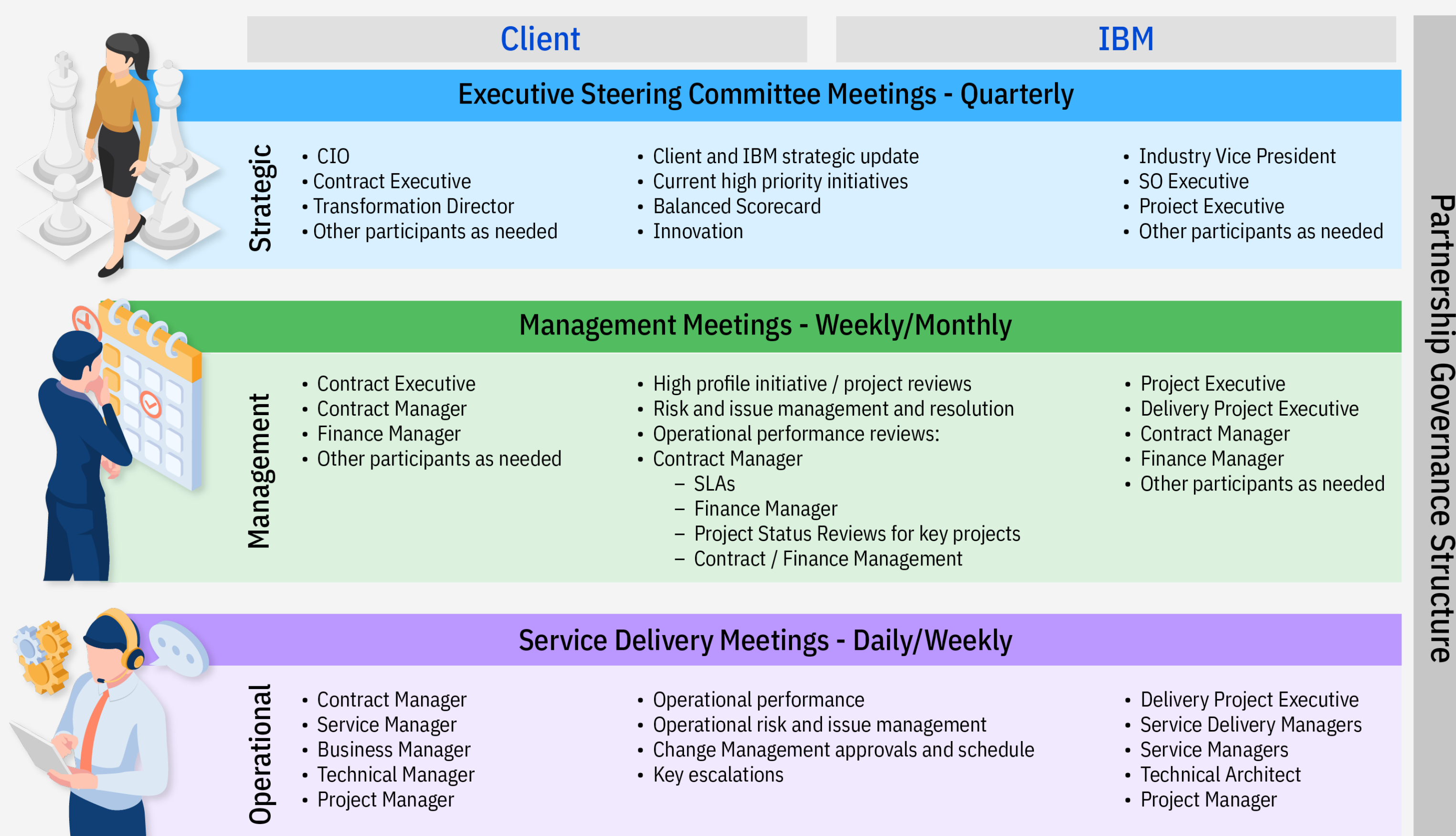


Value of governance

- Consistent communication.
- Transparent priorities.
- Structure is aligned to business strategy.
- Provides clarity of roles and responsibilities.
- Has a clear decision framework which includes the:
 - Schedule
 - Process for change management
 - Deliverable approval process
 - Escalation process
 - Reporting status
- Provides metrics that demonstrate the effectiveness of the governance model.
- Describes the quality of the project outcomes.

Three-tier governance model

Having a good governance structure, allows you to be **flexible** and **adaptable** to a client's needs and wants. The three-tier governance model promotes transparency and cooperation, a win-win partnership between the client and IBM.



Key components in project management governance plan

Select each tab in the flip book to learn which components **MUST** be established in a governance model.

Structure

Goals

Roles

Schedule

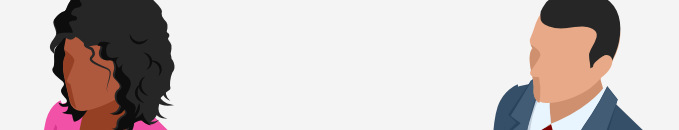
Checkpoints

Quality Process

All projects have roles, all roles have responsibilities. This section of the governance model shows each and a clear list of the responsibilities for each role.

Some common governance roles are:

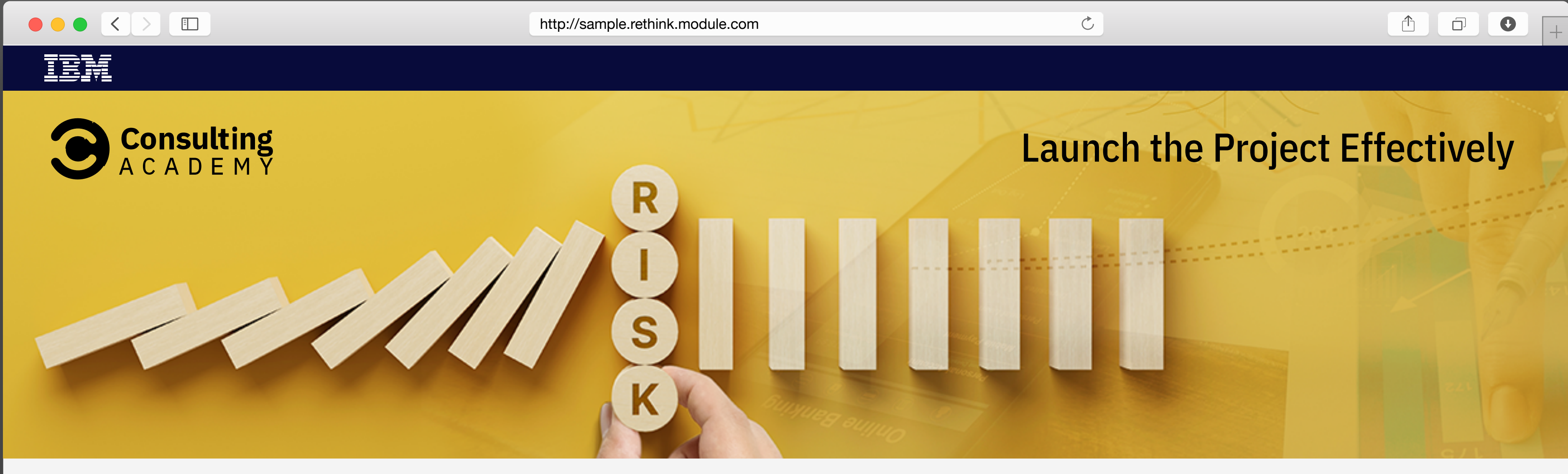
- Program sponsor
- Program governance board (member)
- Program manager
- Project manager
- Project team members



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Risk prediction and management

Apply eminence successfully

All projects have risk factors. Some projects have more risk than others, some projects have less. Some projects have low level risks, and some projects have high level risks. It is your responsibility to determine potential risks, the impact of each risk, and how to potentially mitigate the risk.

Select the **Play** to learn more about risk management.



Select [here](#) to view this video's transcript.

Identify risks and the associated impact

	Assumption	Risk	Impact
1			
2			
3			

A table can be used to help identify risks and the impact a risk or risks could have on the project. To use the table: Identify assumptions and failure points that could put your project at risk. List these in the Assumption column. Identify how this assumption or failure point could put your project at risk and put these in the risk column. Determine the impact this risk could have on your project and put these in the impact column.

When you know the risks associated with your project, you can work toward mitigating the risks, which will increase the chances of a successful project.

Identify assumptions, risks, and impacts

Identify whether the following statements are assumptions, risks, or impacts and move each statement to the correct box. Once you have sorted each statement under Assumption, Risk, or Impact, select "Submit Answer" to reveal the correct answers.

The options

1

4

2

5

3

assumption

This list is empty.

risk

This list is empty.

impact

This list is empty.

Submit Answer

Question not submitted. Submissions available: 1

Causes of troubled projects

You may be starting your project with great ideas and a positive mindset; but you're also likely starting with a few assumptions made based on your knowledge of the project. What happens if your assumptions are wrong? What risks could slow down the project? Not all risks can be prevented, for those that can't be prevented, you should create a risk mitigation plan.

Once you have identified risks, look at your project again to see if you missed any potential risks.

One risk that cuts across all the major management areas is ineffective communications. Use what you have learned previously to effectively communicate with your client, peers, team members, and vendors.

Remember, the Project Launch wheel with eight spokes you looked at earlier in this module? Let's look at some risks you may need to address as you move your project forward.



X Understand my contract risk

You need to know what the contract says and if it clearly stated. Some risks that may occur are:

- No stakeholder agreement
- A poorly stated solution or estimation
- The overall quality of the SOW is poor or hard to understand
- No completion criteria

+ Know my client risk

+ Establish governance risk

+ Financial set-up risks

X Project management set-up risks

All projects need to be managed correctly. If you do not have sound project management, you risk the chance your project may fail. Some risks that can occur are:

- The project management plan is poorly written.
- Relevant stakeholders are not identified throughout the plan.
- A change management process isn't identified.
- It is not known how to handle turnover when a stakeholder or team member moves off the project.
- There isn't total agreement on the solution.
- The approval process is rushed.

+ Supplier set-up risks

+ Technical aspect risks

X Resource my project risks

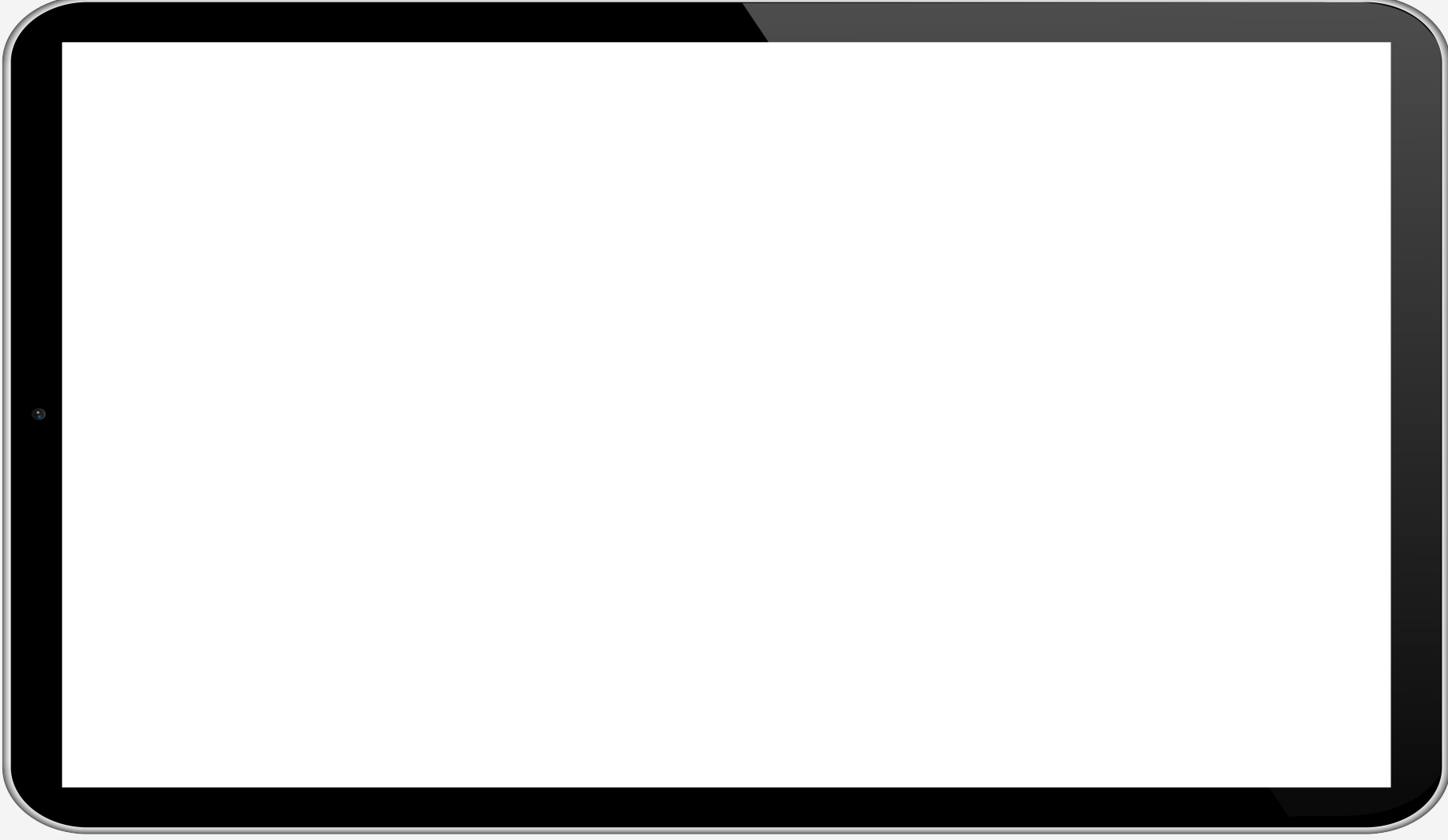
An important aspect of a project, but one that may not always be adequately covered are resources. When resources are mentioned, it is usually assumed to be discussing people. However, remember, there are other resources that may be needed such as facilities and supplies. Here are risks that may occur:

- Inadequate facilities are identified.
- The staffing plan may not be held to. For instance, the SOW calls for x amount of Band 6 resources; however, there are not enough Band 6 resources available, and a higher band is used.
- Individuals do not have the needed skills at the band level requested.
- There is an inability to acquire resources with the right skills.
- There are not enough people to staff the project when it starts.
- Time is not allocated to bring the team together or up to speed on the project.
- The project is delayed, and the resources are on the bench. Do the resources remain on the bench or are they assigned to another project? When the project starts, how will it be staffed?

A real-life tale of risk management

You have been learning how to identify risks and assess their potential impacts on a project. Let's listen to (insert name and job title) as he/she talks about a risk he/she anticipated and a risk he/she did not anticipate and how it was handled.

Select the **Play** to learn how (insert speaker's name) handled risk management in his/her project.



Select [here](#) to view this video's transcript.