

The Myth of Meeting Client Expectations

“Identify and then meet or exceed your client’s expectations!” This exhortation has become the accepted wisdom about how to excel with clients. It is indeed a useful axiom—that is, if you see your role as that of an expert for hire. If you aspire to be a client advisor who builds long-term loyalty, however, it is a dangerously limiting and even misleading piece of advice. Consider these examples of client relationships gone sour:

A shipping company retained a major consulting firm and asked it to help improve the efficiency of its operations. The senior partner in charge of the engagement delegated most of the work to a team of bright young associates whose insightful analytic work identified profit improvement opportunities that exceeded the client’s stated goals. Halfway through the project, however, the client’s CEO called the partner and abruptly cancelled the work for unspecified reasons. Six months later, a friend of the CEO told the consulting firm that the CEO had anticipated a one-on-one counseling relationship with the senior partner, but it had never materialized—“I got this team of young MBAs instead,” he complained.

An advertising agency designed an effective set of commercials that resulted in meaningful sales increases of the client’s product. When the campaign was over, the client put the account out to bid, saying that it had a policy of periodically looking at other agencies for good ideas. In fact, the client’s VP of marketing didn’t like several key members of the agency’s team and felt the overall personal chemistry was poor. He wanted an agency that was more enjoyable to work with.

These are true and not atypical anecdotes about professionals who got canned even though they met and even exceeded clearly stated and formally negotiated client expectations. So what’s up here? How do we cross this minefield called “client expectations”?

Here are four principles that will provide you with the broadest possible palette for adding value to your clients:

Clients always have hidden or unarticulated expectations that have nothing to do with quantitative business objectives.

In the first example described above, the client’s CEO thought he was buying a relationship with a highly experienced partner who was going to provide a forum to bounce around big-picture ideas about his business. Yet even a thorough and questioning proposal development process failed to uncover this assumption. In the second example, the client wanted, in addition to good ads, a warm, enjoyable, personal relationship with his agency staff. In neither case would these expectations ever have been stated out loud, and in any event they were ignored until the consulting firm or ad agency was fired.

Client advisors focus as much on the qualitative, personal aspects of the business relationship as they do on meeting stated operational goals, and they have the sensitivity to recognize them even when the client cannot or will not express them. Sometimes, I’m sorry to say, there are client expectations that are simply unknowable. This is why principle 3, below, is so important—you won’t always be able to grasp every one of your client’s expectations, and so you have to take a broad focus on improving his business in ways he has asked as well as in ways he hasn’t even expressed.

Most professionals define “expectations” and “client” too narrowly.

A CEO I once worked for referred me to a far-flung division within his company, ostensibly to do the same type of strategy development effort that I had successfully completed for him. The division head, indeed, wanted a new approach to the market. The CEO, however, was hoping I would instigate a cultural change—a mindset shift—among the division executives, something I discerned only over a long dinner punctuated by several bottles of French Burgundy (I took a taxi home). Suddenly my task was much more complicated, and meeting my new client’s expectations (a revitalized market strategy for the division) alone would have constituted failure in the mind of the CEO.

Your “client,” in the broadest sense, is far more than the executive who hired you. It could include a more senior executive you’ve never even met, a young up-and-coming manager who is part of a team you’re working with, or the spouse or grown children of your client if you advise individuals.

Improving your client’s condition, not just meeting expectations, is paramount.

I have a current client who asked me to design and facilitate a quarterly strategy offsite with his senior management team. I have done that, and the sessions have been extremely successful (I am not advocating that you dodge expected deliverables in favor of something else—I take the client’s explicit goals very seriously). In between these sessions, however, I have added significant value, including: introducing my client to a potential strategic partner; coaching two senior executives on their managerial style; and helping the CEO prepare his year-end evaluation for his board of directors. These value-added activities were not part of the client’s stated—or even hidden—expectations for this assignment. Yet if you asked the CEO about the value of my work, he would cite these latter contributions as being just as important as the workshops we formally contracted for. (Some readers may be wondering if they should be compensated for such extra services. The short answer is “Yes, but it may not always happen.” You have three choices here: price them in at the beginning; negotiate them as additions to your contract; or give some of them away, especially the ones that are high value but take up little time).

Tell your client, tactfully, about how you’ve helped her.

If you’ve been married or had a partner for more than a year or so, chances are that individual does things for you that you are already taking for granted. The same thing happens in professional-client relationships. Whereas in a close, romantic relationship it is tacky and even neurotic to recite all of your contributions to the partnership (we rely on each other to reach out and recognize them), it is often appropriate and indeed necessary to do it in business. Some clients are great at recognizing your value, but others are so preoccupied with running their businesses that they don’t really add it all up.

You can elegantly highlight the value you have provided in several ways: First, you can sit down and periodically review your performance with your client, and in that session both give and solicit comments about your contributions as well as about what you could do better. Second, you can encourage *others* in the organization to give your principal client feedback about your contributions. Remember, third-party endorsements are far more powerful than anything we say about ourselves. So when a manager in your client’s organization tells you how much she enjoys working with you or expresses gratitude for your contributions—by all means encourage her to tell that directly to your client. The turning point in the relationship with one of my own clients came when a subordinate told him, “I don’t know how much we’re paying Sobel for his work, but whatever it is, he’s worth far more his fees.” (I’d like to tell you that *every* client of mine says this about me, but that would be a lie. Maybe they *think* it without saying it out loud...). When an executive hears this from one of his managers, it is very powerful.

Rethink what you’re trying to do for your clients. Experts for hire and “steady suppliers” merely try to identify and then meet or exceed their clients’ expectations—a level of performance that often keeps them employed. Great advisors, in contrast, look for myriad ways to improve their clients’ business condition, and they help the individuals they serve become better managers and better people. This success enables them to become part of their client’s inner circle.

Which kind of professional—expert for hire or long-term advisor—do you aspire to become?

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