Miss Manners has it going on...

Dos and donts of client interaction for our technical professionals.

By Anne Scarlett, first printed in the *A/E Rainmaker by PSMJ*

So many business development professionals work at firms that have an array of folks 'touching' clients. Construction firms have superintendents and their teams at the job site. Project and program management firms have a manager sharing space within the clients' offices. Water/wastewater firms send engineers on-location. All of these people have different backgrounds, different education levels, and different filters with which they use to communicate. It never hurts for these representatives of your brand to review the basics in terms of how to best interact to leave a positive impression when engaged in client contact. Mastering these basics will, ultimately, enable your employee to grow business with your existing clients. When discussing this topic with your entire staff, first acknowledge the bigger picture, and then move into the basics:

FIRST, BEGIN WITH THE END IN MIND. This mantra, coined by Stephan Covey, holds true during client interaction; be clear on your goals and expected outcomes before you engage with the client.

- **Set realistic expectations from as early as your initial written proposal; reinforce those expectations at the project kick-off.** Where are the boundaries in terms of accessibility, information exchange, and work ethic? How does the client see the relationship evolving over time?
- **Give clients a pleasant, memorable experience in each meeting.** Always consider their perspectives first, remembering that everyone is tuned into channel WIFM, a.k.a. What's in it for Me?
- **Be an active listener.** A tiptop priority in all prospect and client interaction, active listening involves head nodding and other facial/body responsiveness, rephrasing content to ensure understanding, confirming agreement or addressing disparities, and never interrupting.
- **Build and sustain trust.** Remember, your clients buy (and approve decisions) with emotion, yet they justify with reasoning and rationale. Make sure to give them solid, proven reasons to be responsive/approving of your work. Further, let them experience—first hand—your expertise through your actions, your solutions, and your ability to listen and really respond.
- **Be objective and diplomatic.** In the bigger picture, you have to take the high road; finger-pointing and blaming will ultimately leave the client questioning your loyalty towards them.
- **Finally, ask: what's my desired outcome of this meeting?** Even if it's just an informal client interaction, make sure to pre-plan your objectives; agenda/talking points; even possible action steps.

IT ALL STARTS BEFORE YOU EVEN ARRIVE. WHAT TO DO IN ADVANCE:

- **On the day prior, confirm meeting if necessary.** As a side note, always communicate with each individual the way s/he prefers (email, through assistant, by phone, by mail).
- **Prepare content and format for meeting that will bring you to your desired outcomes.** Even if it's the most casual of interactions, take just 5-10 minutes to organize. Bring all documents that you might need to reference or distribute.
- **Pre-select a couple ice-breakers,** especially topical news about the industry, U.S., or the world.
- **Be well-groomed; make yourself easy on the eyes!** Match your attire to their level of dressiness or higher. Take care to have properly-fitting, pressed and clean clothes; shined (or at least clean) shoes. Make sure to have clean hands/nails, and boast a clean-shaven face with fresh breath too!

- **Leave enough time so that you will always arrive ten minutes early.** Allow 'cushion' for traffic, walking time (building to building), etc. Arriving early, incidentally, allows you the chance to build casual, offline rapport with attendees before the meeting begins.
- **Project a confident demeanor.** To relax, take time to monitor and slow your breathing. To raise your enthusiasm for the interaction, do some self-cheerleading by envisioning a successful outcome.

ONCE YOU ARRIVE…

- **It's all about respect, all the time.** Be friendly, conversational, and professional with the receptionist and administrative staff. They'll be watching to see how you treat others, so you must be tolerant of all types. When greeting folks with a handshake, keep it firm, solid, with about two-three pumps for either gender. Say their name as you take their hand. For added warmth and connection with those that you know well, gently touch their forearm.
- **Take care to handle any conflict in private, directly with the source.** Further, don't gossip, anywhere. Imagine having a personal microphone on you at all times, even in casual places like lunchroom, elevator, restroom, lobby.
- **Be sociable, and 'easy' with everyone.** Continue to self-monitor, even if you are onsite at client's facility every day
- **Keep names straight.** When new people come to meeting, try to get their cards, then arrange them (spatially) so that they match their seating position (or draw a quick little chart on your notepad showing where folks are sitting around table)

When it comes to ongoing client interaction, sometimes we just need to get back to the basics…because in the end, it's all quite straightforward isn't it? A happy client is a paying client. And those are the clients we want for a lifetime.

A LAUNDRY LIST OF WHAT NOT TO DO (IMMEDIATE TURN-OFFS):

- Slouch
- Cross arms or in any way look defensive/defiant, superior, conceited
- Look down or avoid eye contact (when thinking, always look upward)
- Look bored or distracted; squirm in your seat
- Rock back and forth; nervous movement
- Swinging or jiggling legs/rotating foot, etc.
- Scratch your head
- Bite your nails
- Bite your lips
- Keep hands in pockets
- Stand rigidly
- Self-touch (picking off invisible lint, etc)
- Chew gum
- Click your pen
- Twist your hair
- Swear (or at least, not any more often than your client)
- Revert to poor English (when you clearly know how to speak properly)
- Scowl
- Furrow brow