

Managing Client Relationships Means Managing the Gap

By
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A client who was moving on from coaching asked me recently to give her a final recap of my observations and comments about working with her and identify key issues for her to focus on going forward. This was an interesting exercise and prompted me to ask her for similar feedback about her experience of working with me. Her remarks confirmed much of what I had concluded but there was one area that surprised me. High marks went to her trust in my ability to help her reach her goals, my knowledge and experience as well as my objectivity. However, I missed an important opportunity to leverage what I knew about her communication style by not initiating conversations that included more detailed analysis of her approach to her goals. Clearly, my perceptions about how things were going didn't quite match hers. Yet they easily could have had I checked in with her earlier into the relationship. Her feedback suggested to me that I revisit my client enrollment process to build in a system for confirming the client's experience right from the beginning. As a result, I've built an extra step in the system to identify immediately where gaps might occur.

What's the lesson? Your opportunity to build a stellar client relationship starts with managing the gap between your perception of how things are going and your client's. Begin the process here . . .

- **Know who your ideal client is.** Minimize problems from the get-go by targeting clients you want to work with and clients you would enjoy and have fun working with.
- **Ask the right questions.** Craft questions that will help you manage client expectations early. If you offer a service, ask how the client will measure results, what criteria he will use.
- **Trust and act on your intuition.** When you feel something is "off" with a client, confirm that feeling by engaging the client in conversation. If your intuition says this is not the client for you, be bold and refer him on to someone who would be a better fit.
- **Get your needs met so you don't need your clients.** Accept clients because you want to work with them, not because you need them to make your next mortgage payment. Build cash reserves so you can always be at choice.
- **Challenge your assumptions.** Confirm your assumptions before acting on them. It will save you from making costly and potentially irreversible mistakes with your client.
- **Survey your clients early into the relationship.** Check in after the first meeting to verify/clarify that you are on target then follow up often.
- **Increase your knowledge base.** Learn as much as you can about your client, his business, his industry, his customers, his problems and concerns. Learn new ways of doing things, new techniques and technologies. Learn how to use new tools to serve your client better.

- **Build trust.** Be reliable, honest and dependable. Keep your client's interests in mind. Avoid political situations that could undermine your relationship with your client.
- **Learn to negotiate.** Possibly the second most important skill in managing your business, mastering negotiation skills will give you a sense of power in constructing a client relationship that wins for both of you.
- **Anticipate and initiate.** Look for opportunities to help your client achieve his goals. Include your client's goals in presenting new ideas. Step back and see how your client might see a situation and respond accordingly.

Knowledge is power! The more you know about what your clients really want, the more effective you will be in managing the relationship.

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