

## **Saying No to a client**

One of the hardest things in business can be saying no to a client, after all, we are there to serve them, aren't we? They say jump, and we say how high. That is what they pay us for.

This is often true, and I have done work for clients that made perfect sense to them, but would have made no sense at all in a different organisation, who might have viewed my contribution as a waste of money. I will question a client to be sure I understand why they want something, and if I can see that it will give them something useful, then I am happy to oblige, but I do apply some obvious rules to this decision making process, and this is where the first instance of saying no might arise.

**1 Is it legal?**

**2 Is it ethical?**

**3 Does it infringe my professional standards?**

If a client arranges an introduction for you to their biggest competitor, so that you can do some work for them and at the same time give them competitive intelligence, this is not illegal, and from their perspective might not look unethical, but it certainly will from yours! It will also infringe your professional standards, which will always include maintaining client confidentiality.

A different example of infringing professional standards is in the field of market research. A client asks you to do a customer satisfaction survey for them, and then wants to slip in a few sales questions, and before you know where you are, you find yourself "sugging" (selling under the guise of market research). In this case you would push back firmly, and tell them that either they want a credible piece of research, or a sales campaign, but they cannot have both.

In a way, questions 1 to 3 are the easiest to deal with, since you are protecting your reputation, and your client will normally understand this. So let us now look at areas which are less clear-cut.

**4. Will this deliver a good result for the client?**

Sometimes a client will commission a piece of work which you do not feel will deliver a good result. It is your professional duty to question it, and really understand what they want and why. If you can predict that the result will not be what they want or need, then you must tell them now, because at the end, they may decide that the reason why they are not happy is because of you, not because of their brief.

On rare occasions it may be necessary to go into writing with a client, defining precisely what the outcome of the work will be, and what issues will be left outstanding when it is complete. If a client insists that they know best, then you need to put your case on record before you start. Alternatively, you may decide not start at all, because if the difference between you is so great, you may prefer to decline the work, and sometimes that will be the trigger for the client to reconsider.

If you shrug your shoulders and tell yourself that you are only doing what they ask, then you may be putting short-term revenue before long-term reputation. It is very easy to get tarred with an unsuccessful brush, and if you say it was against your advice, people could still question your professionalism in carrying out a piece of work that you did not believe was of value.

## **5. Does it meet client wants or needs?**

This is really an extension of item 4, but it merits separate consideration because it is often the case that the client does not appreciate what they really need, and therefore what they ask for is different.

Training is a classic example. “Our staff need some motivational training because their performance is apathetic and lack-lustre.”

There are a million variations on this theme, and the reality is that it is the management who need the attention far more than the staff. Managers often want trainers to come in and “fix” their staff, and think they are doing a good job of managing by just organising the training.

A bad consultant will come in and deliver only the staff training.

A good consultant will spend time with the managers, persuade them to attend training or have some coaching themselves, and then work with them to devise a motivational environment for their staff. This may or may not involve training, but it will get to the root of the problem and effect real organisational change in a way that just running staff training courses will not.

Similarly your reputation will be enhanced or tarnished by the way you approach the situation, as well as by the results you deliver. It is not necessary to spell out to a client that “they’ve got it wrong”. You can simply build on what they are requesting, and broaden the scope until it fits what they need. The fact that it is now completely different is something that needs no comment from you – it has become a jointly agreed plan.

## **6. Is it a reasonable request?**

This question applies when you are engaged in a project with a client, and they want to make a change that has time or cost implications for you.

“I know we said the end of the month, but I need that report by Friday now.”

First check on what is driving the request. Some clients just ask for things arbitrarily, and these are the ones to say no to.

“I’m sorry, but that will have implications on everything else I’m doing. Do you want me to change the whole schedule to bring this date forward?”

Your aim here is to maintain the status quo, and hope that in looking for an answer to this question, they will discover that their need for the report is not quite so pressing after all.

In some cases, however, there is a genuine need.

“I’m afraid we will have to do something, as they’ve brought the Board meeting forward.”

Now you are looking for a solution to a real problem, but your response is the same, because, whenever a client asks for a change, it needs to be a negotiation about the impact on the rest of the project, and if it really does not fit, then will they pay extra for it?

Here are the rules when the client asks you for any change to a project:

- Never say yes immediately – you always need to buy time
- Never say no either, it is not a word to use with a client.
- Say – “Let me look into that” as your most positive answer, if what they are asking for looks minor and manageable.
- Ask questions in any other circumstances, and then set an expectation that this is going to be difficult or expensive, so that when you go back to them, they are prepared for the worst.

Having a formal change control process is vital in a large project, but even then scope creep can happen, largely because of individuals saying yes when they should say, “Let me check”.

Wherever possible, share the planning with the client. “If you want the report tomorrow, it means....” Do not feel it is your problem to solve alone. If they have agreed the project scope and employed you to deliver it, and now want to change the rules, it is their problem too!

Most clients will respect you more for standing up to them when you need to, and for advising them well on what will deliver for them, even when they think differently.

It is also useful to remember that saying no need never involve using the word!