



Notes Template for Moderators - 2018 Business Round Tables
Committing to Continuous Improvement
Nashville, Tennessee; Friday, November 2, 2018, 3:20 to 4:45 PM

Table No. (1 to 13): 8 Topic: How to Deal With Difficult Clients

Moderators: Steve Ormond & Teresa Peterson

Number of participants at 1st session: 6 Number of participants at 2nd session: 4

Insert an abstract of the topic here.

Professionals such as engineers, doctors, and lawyers, who depend on their clients to seek and pay for professional services under established ethical and quality of service rules, are often confronted with situations in which continuing to serve the client is difficult or impossible due to client actions. We will discuss how best to manage those situations and some tools to use to protect the best interests of both the professional and the client.

Briefly summarize the ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Difficult clients include under educated clients. They don't understand our value, set unrealistic expectations for fee and schedule, and can't provide direction on what they want for the site
2	Clients that are unethical or ask us to conduct ourselves in unethical practices are bad clients
3	Clients who think they are more educated than us are difficult. They try to lead us down the path they want, to get the answers they want, and may shop around until some consultant gives them the answer they want. They may ignore our advice and findings.
4	Situations where we are a sub and have no direct contact with the owner or decision team are difficult client situations. Geopprofessionals should be part of the decision team along with the architect, civil engineer, etc. The insights we bring can help save time and money.
5	Legal professionals are more quick to pursue legal action against a client than engineering professionals. We prefer conflict avoidance and are often "people pleasers". We don't stop scope creep early enough.
6	If we are involved in the design effort, we insist on being involved in the construction effort as part of our proposal. We need to protect ourselves against field changes and provide continuity in design decisions.

7	Consider using Vimeo or similar services to generate short video clips of findings and recommendations. These clips can be emailed to clients. We need to prove that we are making every effort to transmit information to the clients.
8	It is possible to re-engage with a client after a lawsuit. It takes time to re-establish a relationship, but both parties have a greater appreciation of the boundaries
9	If a client desires a reduction in fees, consider whether project scope should be limited accordingly, or whether it is helpful to propose optional scopes at different costs.
10	Staff should be trained to identify the characteristics of difficult clients.

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Educating a client is the best tool against difficult clients.
2	Educating less experienced PMs on how to spot a difficult client, and how to react to a difficult client, can protect the firm. GBA's online training materials are a good resource.
3	Some of our best clients are ones that were "fired." They learned to appreciate the value GBA firms bring to a project and treat us with greater respect on future projects.