HUMAN RESOURCE EXECUTIVE

# Setting the Stage

We cannot stress enough that managing client interactions is about partnering in the moment, using each interaction to move forward the levels of trust and commitment and the quality of results. Two elements are key to managing client interactions successfully: (I) You must get ready by putting yourself into a partnering frame of mind; (2) You must focus on playing the consultative role of facilitator to keep the dialogue open and moving forward to complete resolution. In order to do the latter, you must have a goal in mind for the current interaction--what you want to accomplish during this conversation.

Getting focused and defining your immediate goal are the topics covered in this chapter. Together, they can be considered equivalent to the work an artist does in preparing to paint: applying a base coat to the canvas and sketching the outlines of what she wants to render. The first stage of any client interaction is to get ready mentally and physically. It doesn't matter whether you are preparing for an informal meeting or a major presentation--this is an important stage.

During client interactions, you need to focus simultaneously on your own thoughts and reactions; the client's body language, tone of voice and words; and the general situation--the purpose of your discussion, potential outcomes and environmental factors. Together, these make up what might be called a partnering awareness. Being conscious of these three elements enables you to stay engaged in the conversation while learning from the interaction in ways that you can apply in the future.

For example, this story, told to us by Catherine Card, a distributed support and operations consultant at Science Applications International Corp., illustrates the challenge of maintaining a partnering focus--making a conscious choice to respond consultatively in the moment rather than letting survival instincts take over: "I was recently in a meeting with a group of my team members and clients. One team member challenged me, as he was concerned we were going in the wrong direction. Since clients were in the room, my immediate instinct was to strangle the person--or at least ask him if we could talk later! But I caught myself in the moment, took a deep breath, and instead asked him to explain more specifically his concerns with our direction. As he explained, I responded with questions with an emphasis on the client's perspective.

"From that point on, I was able to steer the conversation better and respond to his concerns. By being conscious of not reacting immediately and instinctively but instead exploring the concern, I am able to manage my client interactions like I never could before."

Like Card, become a keen observer of what is going on with your client, with yourself and with the situation. During your interactions, stay focused on the following:

- What you are learning about the client's opinion/frame of reference and the strength of his or her feelings and needs;
- How you are thinking and feeling, and how you convey your stated and unstated needs;
- What is needed to move the situation forward to achieve optimum results.

## Partnering Anchor

Getting ready is easy when you have plenty of time to prepare. Given an hour or two to get dressed to go out for the evening, most people turn out looking fairly presentable. But what if a friend calls and says, "I have two tickets to that sold-out show you've been wanting to see. It starts in 45 minutes. Meet me there." If you're fortunate enough to own a perfect jacket, one that fits great and dresses up whatever you wear it with--and it isn't at the cleaners--you'll be OK. Otherwise, you'll probably arrive either unfashionably late or just plain unfashionable.

What does this have to do with client interactions? Suppose you're at your desk, eating your lunch, and a client you've needed an OK from for several days finally returns your message. He's traveling, calling on a cell phone and has five minutes between planes. Patience is not his middle name. Suddenly you're on the spot--here's your ticket to the show, so to speak. Do you have a "jacket" to wear?

A "jacket" in this case is what's called an anchor--a way of clearing your mind and immediately focusing all your attention on the task at hand.

Many people use anchors before performing on stage, competing in sports events, speaking before groups, or conducting sales calls. One client told us that his anchor is to sing along to a tape of his favorite aria while driving to the golf course. The anchor clears his mind and improves his golf game. Other people use visualization, positive affirmations and relaxation exercises to help them get focused and feeling upbeat before important events.

Think for a moment about how much noise you listen to every day without recognizing it. Distractions happen constantly and can inhibit listening, building rapport and staying focused. Minimizing distractions is an important part of getting ready for client interactions.

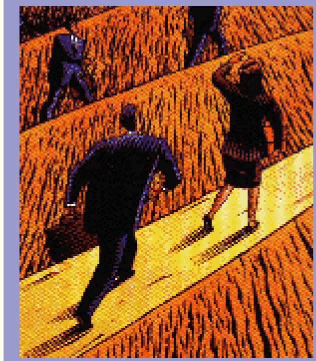
A workshop participant relates this story: "I had been working with a middle manager for about three months. I found that every time we had a conversation in her office, we never got anywhere. She kept taking phone calls, which interrupted our train of thought. I decided to ask the manager to meet outside of the office for lunch to discuss a project situation. It was so simple, and the lunch went great ... until her cellular phone rang. It was her secretary! After she hung up, I jokingly said, ‘I need to take you hiking in the Grand Canyon to get 15 minutes of your uninterrupted time!’ We laughed as I explained how frustrated I had been over the past three months. The relationship took on a whole new direction. Now we meet outside of her office, and she turns her phone off."

In reviewing the types of distractions you experience, consider the sources of distractions within yourself and from the client and the situation. What inhibits your ability to focus?

## Drop an Anchor

A partnering anchor will help you establish a collaborative frame of mind before going into an interaction. An anchor is something that you do or think that makes you feel good and very “present.” It can be as simple as taking a deep breath (and letting it out), thinking a particular word, or snapping your fingers--or it can be more elaborate, when you have the time. If you are fearful or anxious going into a situation, these feelings can negatively affect your behavior and concentration, so it is important to enter into a conversation with the most positive, upbeat attitude you can create.

Anchors should be easy to recall and not take very long to complete. Remember that ideally your anchor will be something you can do anywhere, anytime, to quickly get mentally and physically “present” and focused. You might want to consider the following ideas when developing your own partnering anchor:



- A body movement, such as a dance step, hand gesture or facial expression;
- A sound of some kind such as a song, positive affirmation, tongue twister or whistle;
- A visualization of a positive place or experience;
- A relaxation activity, such as breathing slowly and deeply.

Jot down your ideas for a partnering anchor. Then pick the one that most appeals to you, and try it out for a few days. See whether it helps you prepare mentally and physically to be present and ready for partnering during interactions. If not, change it or try another idea.

### Define Your Goals

The second stage of managing client interactions is to define your goal for the interaction. The goal is the focal point that helps you direct the discussion, but it is key to think of the goal as flexible and not as a necessary result-a "nice to have," not a "must have."

A goal can be determined in both spontaneous and preplanned situations. In determining your goal, consider:

- The optimum result you want to achieve in this interaction, and
- The way you can use this opportunity to build trust and commitment.

Having at least one goal is critical to influencing the direction of the discussion. Some goals and assumptions should be stated or clarified at the beginning of the interaction, such as how much time is allotted for the discussion. You may have other goals that you should not or do not want to state explicitly, such as making a sale or building rapport.

John Lingvall, a performance consultant at Bank of America, illustrates the value of goal setting: "With all the changes that are going on with our clients, one of my first goals is to find out what they are going through and how it is working out for them and their team. I find that when I focus on this goal, the senior managers immediately open up and share their true thoughts." When clarifying your assumptions, stated goals and unstated goals, think through the following questions:

- What assumptions are you making about time, equipment, authority, direction?
- What are you basing your assumptions and conclusions on?
- What assumptions and conclusions do you want to share with the client?
- What assumptions is your client operating under?
- How can you further develop trust and a sense of partnering in this interaction?
- Are there areas of resistance you want to understand better?
- How open or closed are you in your own opinions about the situation?
- Which of your goals for the interaction are you willing to share with the client? Based on the time allotted, what can you expect as an optimum result?
- What is the client's goal for the interaction?

## Creating a Common Goal

If you and a teammate are planning a joint discussion with a client, make sure both of you share a common goal for the interaction. This way you will present a united front and help each other and the client stay on track.

A workshop participant related the following story illustrating the importance of determining a common goal before an interaction: "A colleague and I went on a call together, but we never got around to discussing our goal beforehand. After the meeting, my colleague said that it had been a horrible conversation and that we would never get anywhere with the client. I looked at him with amazement, as I had thought the call went exceptionally well, and I had met my goal. I learned after the fact that my colleague had gone in with the goal of finalizing a particular decision. No wonder he was upset!

"Upon reflection, we realized how discussing our goals up front would have been valuable for a couple of reasons. If we had set realistic goals, we could have better supported each other during the meeting. We also would have had a better yardstick for measuring the result."

Does the following situation sound familiar? You've scheduled a one-hour meeting and taken time to prepare your notes and an agenda. The discussion begins with pleasantries about the weather. You quickly review your agenda items and ask everyone if they have anything to add. Numerous people suggest additions to the agenda.

Looking at your watch, you realize that 15 minutes have passed, and all you've accomplished so far is catching up on the weather and creating an expanded agenda. You're already behind schedule, and there isn't enough time to get through! You feel rushed and worry that your items won't get the attention they need.

During the first 60 seconds of your client interaction, make sure that expectations of outcomes ("What are we here to accomplish today?") are clarified and that they can be met within the time allotted. It's easy to get caught up in creating an agenda and forget to clarify and agree on goals that can be achieved within the available time frame.
To ensure that this doesn't happen, take the following steps:

- Clarify expectations for the interaction.
- Determine the allotted time.
- Agree on goals for the interaction based on the time available.
- Discuss assumptions that you and the client have.
  Remember that each interaction is a small step forward. Having a common, realistic goal and clearly established parameters and expectations puts you one step closer to optimal results. Just as important, it contributes to building trust and commitment.



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