

# marketer

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## What Was I Thinking?

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**“W**e’re talking to a range of firms.”  
“We haven’t thought about a budget.  
What do you think we need?”

“No one we’ve worked with yet understands us.”

“Can you get us your proposal tomorrow?”

“Give us a good price—there’s lots more work coming.”

Ah, the prospective clients’ anvil chorus! And what does the firm that hears these equivocating statements do? What most would do in the same situation: Rush out the proposal. Exhaust people and resources but craft a brilliant presentation. Negotiate a competitive fee that pleases the new client, though less favorable than the firm had hoped. Then, in the aftermath of the contract award, spend chunks of time shoring up a testy, incompatible relationship... wonder why this project became so difficult to achieve...and, finally, become part demoralized, part grateful when the client goes elsewhere for the next job.

Could it be that firms concentrate on getting and keeping clients—even scuzzy ones—but never ask themselves the most important question of all, up front: “Is this the right client for us?”

It’s so nice to be wanted. But before the thrill of the chase consumes you, it’s good to remember—even in a recession—that some clients are difficult, disorganized, or combative. And that—just as your firm is not necessarily the right consultant for every project or organization—there are some organizations and people who should never be your clients.

I asked around why bad client choices happen. Doug Gould, whose eponymous firm consults to nonprofits and foundations on their outreach, answered laughingly, “It’s so easy to get confused by people who are very charming, iconoclastic, entrepreneurial, full of new ideas, and opportunities. You’d like to work with them. And you’d be dealing with such great personalities.”

If it’s true that like is attracted to like, then of course you’d want to be the one to help out, fix the problem, and star in a tough situation. But why work for an organization that is guaranteed to be a real problem?

Here is a list of things to check out to make certain that your firm will be working for the right client—assuming that all other criteria, such as marketplace and location, match your marketing and business plans.

- Past experience with design and construction
- Compatible personal and work style (dress, offices, performance standards, and approach)
- Prior relationships with professional services providers
- Culture (corporate versus institutional or governmental, for instance)
- Clarity in thinking about and expressing what they want
- A timeframe for the work
- Willingness to discuss budget and fees, clear that it’s appropriate for you to make a profit
- Credit rating
- Reputation for paying
- Fathomable accounting and contracting rules and procedures
- Access to the “real” decision-makers
- Suitable counterparts in staffing
- Motivation and readiness to proceed and change
- Ethical dealing
- Profile of litigiousness

Using this checklist, think about what you observed about your prospective client. Consider whether what you have *not* seen or heard is important. You need this information to make an educated go-no/go decision. “It never hurts to ask *anything*, so long as you are prepared to be told, ‘I’d rather not answer that,’” counsels Peter Piven, FAIA, the Philadelphia-based principal consultant of The Coxe Group.

I’ve queried some experienced people on how they couch these questions and validate their perceptions. They provided this hard-earned advice.

- For those who are checking an array of firms, ask: “How will you be the kind of client we want all our clients to be?” recommended Piven.
- For those with past consultant relationships: “Whom have you engaged previously? Why are you seeking a new provider? Have you had disputes in the past over quality of services or fees charged? Are there service providers that we can check as references?” said George Christodolou, a Boston lawyer who represents professional services firms in all professions.
- For those with no timeline: “What’s holding you back? Are you sure you’re ready to go ahead?” suggested Vickie Sullivan, speaking circuit consultant, writing in RainToday.com.
- For those you’re not convinced are above board: “[What are your compliance regulations] to make sure we operate within your guidelines as well as ours?” offered Jim Grigsby, author of *Don’t Tick Off the Gators!*
- For those ready to go ahead: “If your contact person during the life of the project leaves, will we have the right to meet his or her replacement to make sure there’s a fit?” recommended Mitch Levitt, FSMPS, president, Karlsberger Companies, and a past president of SMPS National, and Don Tuttle, Karlsberger’s SVP/CMO.
- “We have access to some of the most sophisticated databases in the world,” Levitt and Tuttle advised. “We also speak to our trusted resources. That’s because we want to talk like our clients, work like them, think like them. That requires learning everything we can in a very short period of time. We’re going to spend months living in their house. No matter how much we might need the work, the pain is just not worth the risk.”
- For those who are publicly traded, ask your financial officer to check their *short-term* bond rating, or look them up on Google or Yahoo Finance. You can also get their Dun & Bradstreet profile, analyst opinions, SEC filings, and the like, suggested Charles Temel, SVP/Investments, UBS Bank.
- Temel also coaches, “It’s *your* risk tolerance, not theirs. If people want something I’m not comfortable with, I’m not going to do a good job for them. If they are too conservative, or wild, or difficult, then they are going to require more time than I should spend with them.”

How do *I* do this due diligence? Not always well, I admit. However, when I meet a client for the first time, and it’s a good idea to go to their offices because I know in a flash whether we’re compatible from the way they live, I’ve learned to always bring someone with me to take careful, nearly verbatim notes. They’ll reveal what was really discussed and what was avoided. I’m too much in the conversation to see the patterns that emerge, who speaks and who’s silent, certain issues that keep coming up. It is enormously helpful to read those notes and observe the dynamic.

**“There are some organizations and people who should never be your clients.”**

Finally, there’s no shame to parting—professionally and cordially—if this new opportunity doesn’t measure up. Tell them that this isn’t the right job for your firm. You can even tell them what in the process your firm found difficult to comply with. Suggest someone else. If you feel the relationship might be desirable in the future, suggest when you might speak again. The prospective client will be surprised and will surely tell others how you handled their rejection. Who knows, one of them might be the right client for your firm. ■

**Editor’s Note: How do you figure out if a client is right for your firm? Let Joan know at [JCapelin@capelin.com](mailto:JCapelin@capelin.com).**

### About the Author



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