Exhibit 11-1: Good Clients and Bad

I'm thinking of giving up performance consulting. Premature retirement due to breakdown. No, no, I am only joshing, but I must admit that a couple of my clients are getting beneath my professional cool, calm, and collectedness and are hastening me toward a place in a rest home. One has imposed on me impossible deadlines; a second keeps changing tasks; a third never pays his bills on time. I would love to berate all these bad clients and tell them how they are responsible for making me a mental wreck. But the truth of the matter is (alas!) it really is my own darn fault!

Training in the Technology of Performance Consulting

Why am I sharing my woes with you? Because in my travels and during professional conferences I frequently spend many an hour having my ear bent by one colleague or another bemoaning her or his dismal treatment at the hands of an ungrateful client. Martyrdom seems to come with the trade.

To some extent, this is understandable because our training is in the learning and performance technologies we employ. We study and practice task analysis, media selection, performance audit, job aid design, and other useful professional skills. I have yet to attend a class on "Client Training" or on "How to Avoid Getting Mangled by the People You Work For." No one ever taught me how to negotiate a contract, or build in sign-off points, or even how to bill a client. And because of this, many of us—myself certainly included—may be fine at applying the tools of our trade, but we end up as less than rank amateurs in our business relationships with our clients.

Is This Message Aimed Only at External Consultants?

No way. Even internal consultants (and I have just witnessed this inside a large corporation) within an organization experience many of the same problems as external consultants: lack of clarity about the missions and/or tasks, unrealistic budgeting, vague or impossible deadlines, unclear assignment of responsibilities, lack of sign-off points, uncertainty as to who holds copyright exclusiveness or nonexclusiveness of right to content or materials use, field trial and revision responsibilities, confidentiality...I could go on and on.

Who's Responsible for the "Goodness" or "Horridness" of Our Clients?

I don't want to assume the mantle of responsibility for all the world's ills, but I do believe that a large measure of responsibility for ensuring that our clients are "good" resides with us. Let us remain coherent with our performance-consulting philosophy: if the system we create does not work and the targeted performers cannot do the job, it is our fault. We are professionally committed to this principle and, barring major unforeseen factors, we accept the responsibility to analyze the system in which learning and/or performance is to be improved, design suitable interventions based on our analyses, and then verify and revise those interventions until they work. Ditto for clients.

If we are performance professionals, we had better clean up our acts with respect to the ways we both manage and are managed by clients. We need to build in systems and safeguards that protect our clients and ourselves from communications (and nervous) breakdowns. This means

- drawing up formal (but not necessarily legal) documents that clearly and unequivocally specify the milestone and scope of the project.
- putting in writing the responsibilities, duties, and perhaps even major tasks for both consultant and client.
- drawing up timelines that are realistic—not just wished-for. My experience has been that we generally do not allow enough time for our clients to study our draft documents thoroughly and generate useful feedback.
- creating very complete budgets that carry no hidden surprises for client or consultant. Many outside consultants get into financial difficulties because they underestimate the cost of a project to land a contract. That does no one any good.
- specifying a number of intermediate, formal sign-off points. These indicate that the client has approved the intermediate product (such as the task analysis, the objectives, or the interventions).
- specifying invoicing and payment due dates, and penalties for late payments.
- specifying the legalities surrounding the content and rights to the final products. These include content or even project confidentiality; right to reuse the content or format of the final product; exclusive-use rights; copyright ownership; royalties; even whose names go on the finished products, where, and in what font size.
- clarifying later rights and responsibilities for reproduction, revision, periodic monitoring, and other legal/technical points.

There is probably a lot more that could be added. However, I am not an expert myself. Experience is my teacher—and let me assure you, I am finding it to be a very tough instructor.

To Any Clients Who Are Reading This

What I suggest for the performance consultant is very useful for the client as well. Support the people who are dealing with your problems; collaborate with them on specifications, budgets, timelines, and payment schedules. These actions benefit you in the long run. If the client-consultant relationship runs smoothly, everyone's energies can be focused where they ought to be: on the success of the project.

To Conclude

We pride ourselves on our professionalism in the learning and performance domains. To practice our professionalism we must create conditions with our clients that will help us achieve their goals as effectively and efficiently as possible. That means becoming better client managers. Theoretically, just like our learners, all our clients should reach criterion. There should be no bad clients if we correctly prepare the people with whom and for whom we work.

Now all I have to do is follow my own advice.