



Risk Tip 3. Client Communication

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In this day and age of 24/7 availability, client communication is more important than ever as a tool for managing a project. New communication tools can make the task easier or harder but the basic principles for effective communication never change. Here we present a few tips for communicating with your clients.

Call early, call often. Talking to your client is the best way to establish a relationship. Chit-chat is not a waste of time if it helps you to get to know your client and his issues.

Find the best time to talk with your client. Is the client a morning or afternoon person? Does the client have more time to talk at certain hours of the day? This can be important – calling a non-morning person with a problem before that first cup of coffee can be a recipe for disaster.

Find the best method of communication. Email, voice mails, or text messaging may be the easiest method of communication for some clients, particularly if they or you are usually out of the office. Other clients prefer phone calls and hate email. Sometimes scheduling a time to talk is the best method, especially if the topic requires a long discussion. Treating the phone call like a meeting can guarantee a window of time when you are likely to get the client's (mostly) undivided attention.

Figure out your client's communication style. Does your client like to work up to the topic or is the client a cut-to-the-chase type of person? Some people like to cover every topic on their mind in one phone call and some prefer to deal with only one issue at a time. Use this knowledge to develop your agenda so you can make sure the important issues are covered. Get it wrong and questions can go unasked or unanswered. Remember, it's not about what's convenient for you – your client is the boss. If it takes four phone calls to get answers to four questions, then call four times.

Email is handy, but misunderstandings can easily arise. Text can be misread and emotions are hard to convey in words alone. Trying to be funny or sarcastic can especially backfire in emails, those cute little emoticons notwithstanding. Even a misspelling, especially easy to do on a mobile device, can lead to misunderstandings and spell-check may not save you. It's amazing how much information a tone of voice can convey. The lag time between replies, even in text messaging, can also contribute to problems. If your client is annoyed about something, the client can become even more annoyed while waiting for your reply.

Be sensitive about protecting your client's confidential information. Your client is bestowing a great deal of trust and confidence in you. You can easily destroy that trust if you are not careful about protecting your client's information. Know what may be sensitive information about the project and only share it with sub-consultants and other project participants on a need to know basis. Make sure that they understand as well the need to protect that information. You might want to use information about the work you are doing for your client as a reference to gain other work. Before you do, remember that in this case it is always better to ask permission first, rather than forgiveness later.

Bad news is best delivered in person, or at least over the phone. The instinct to take the cowardly way out and send an email is overwhelming, but don't do it. All of the problems listed above become even more important when the topic is a difficult one. You need to hear your client's tone of voice and respond to it immediately. Your tone of voice and mannerism can be reassuring to your client. The give and take while working out a problem should be instantaneous and clear without the misinterpretations that email, or worse the abbreviations of text messaging, can give rise to.

Always document the outcome of phone calls involving project decisions or finances. Whether it's an email or a letter, write it down and do it soon. It's too easy for everyone involved to forget decisions once they hang up the phone. Plus, if one of you really did misunderstand exactly what was decided, the other will realize it when he reads it. Phone calls can result in misunderstandings too. If worse comes to worst, written documentation will hold up better in court than verbal testimony about what was decided.

In summary, client communication done well can save untold grief and aggravation. Think about the best way to communicate with each client and then follow through.

This Risk Tip is intended to provide current and accurate information to assist the reader in becoming more familiar with the subject matter. It is informational only and not intended to substitute for technical, legal, or risk management professional advice. The reader is encouraged to consult with an attorney or appropriate professional consultant to explore this information further.

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