The Leadership Program

Managing Difficult Clients

October 2019

THE KINETIX GROUP

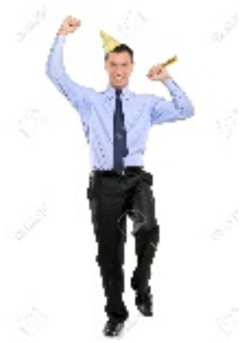
Agenda

1	Recognizing and Dealing with Challenging Client Situations
2	Group Workshop
3	Key Learnings/Wrap Up

Goals for Today

1	Recognize potentially difficult situations before they escalate
2	Learn tips and techniques for dealing with difficult clients
3	Develop leadership skills to mentor teams in difficult situations

Difficult Clients You May Encounter



Party-member Patrick:
He can't make a single decision without consulting with someone back in his office.

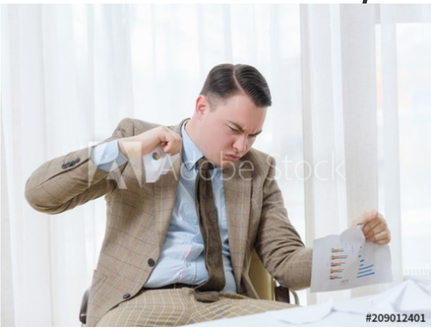
Know-it-all Nancy:
She knows your business better than you do and she'll tell you everything you're doing wrong, at the top of her lungs, until you wonder why she's bothering to hire you in the first place.

It's a simple Job Jason:
Declaring that everything is simple and easy and you won't have any trouble, while asking for a million customized details and complex systems.

Who Else is Out There?

Emergency Edith:

Everything needs to be done yesterday. Edith has no concept of the fact you have other clients and expects you to bend the space-time continuum to meet her impossible deadlines.

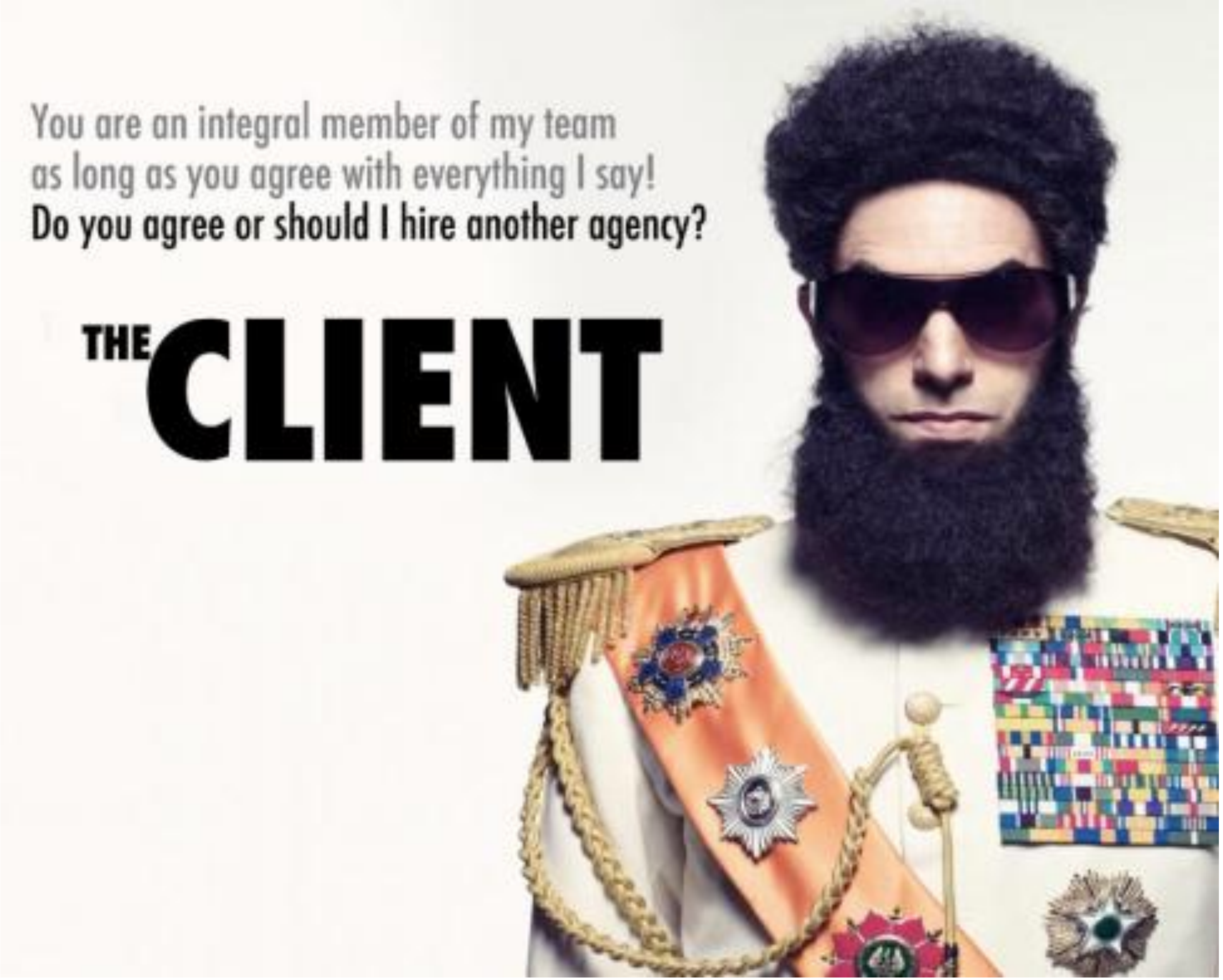


Bitching-about-the-bill Bill:

Bill scrutinizes every details of your invoice and tries to eke out as much free work as possible.

Terrible Terry:

Terry screams down the phone at your staff members and berates you in public over seemingly minor issues about your work. You sleep with one eye open.



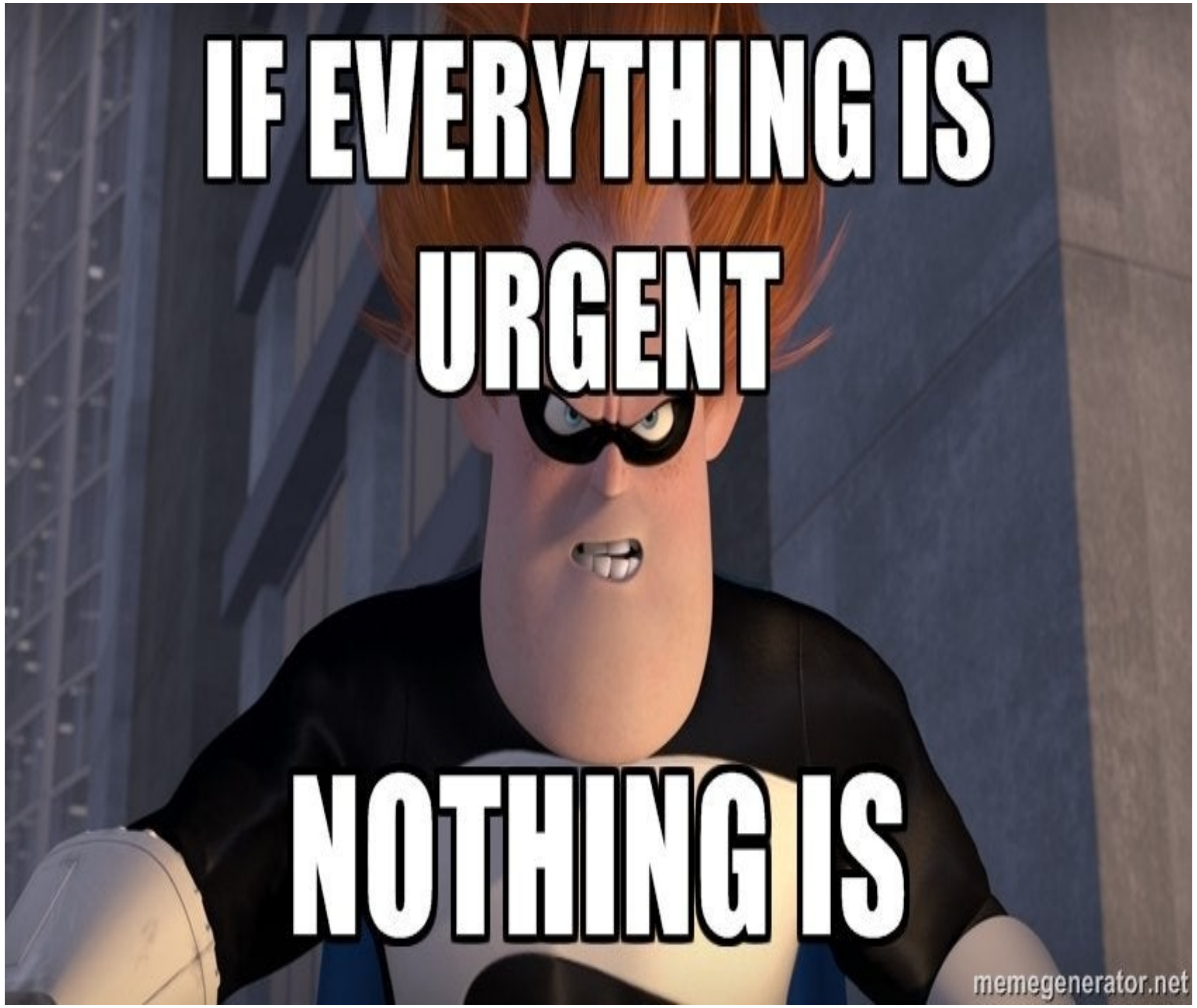
Discussion

Are there other difficult personalities?

Difficult Behavior and Early Warning Signs

Are they really being difficult or just have high expectations?

Categorize Difficult Behavior		Early Signs Behaviour May Become Troublesome
• Micromanaging	→	• Instructing exactly what to do then changing direction
• Deluge/drought of feedback	→	• Frequently cancels meetings/asks input from many
• Impossible deadlines	→	• Emails and texts project needs and feedback.
• Lack of experience or nitpicking	→	• Poor planner, late for every meeting or no show
• Credit grabbing/blame assigning	→	• Criticizes former agency or coworkers



Discussion

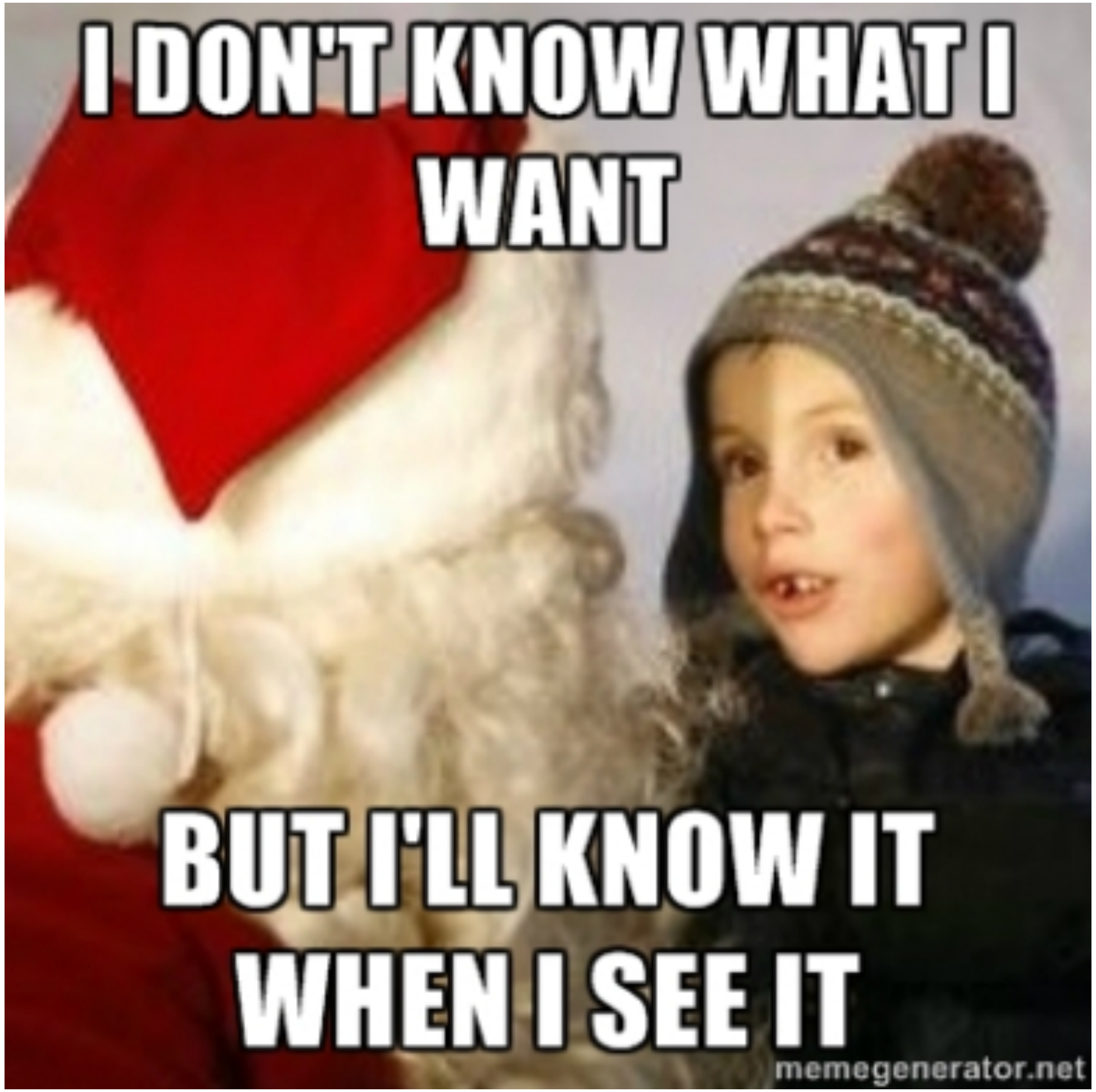
Are there other early warning signs?

What are steps you can take to prevent an issue from escalating?

Consider What Is Fueling the Difficult Behavior

Internal pressure *(ie launch, deadlines, sales pressure)*	Difficult boss	Lack of understanding	Short staffed/unsettled work environment

Put Yourself In Their Shoes!



Discussion

What else could be triggering this behavior?

How do you coach the team to understand the clients perspective?

How to Cope

Put the situation in perspective of the larger client assignment/scope

- Made a small error
- Made a major error
- Missed a deadline
- Determi
  impacte

Strategies for solutions

- Focus on the work
- Over communicate – go beyond email; live mtgs or even phone are ideal
- Set clear expectations – be honest about timing and budget
- Rally support (as appropriate) with others on the client's team
- Maintain a calm and professional tone while also remaining

Break away from your emotions: It's NOT Personal!

- Never say or write anything that can be used against you
- Always resolve disputes in person or over the phone

7 Tips for Addressing Challenging Situations

1 Stay calm

2 Listen

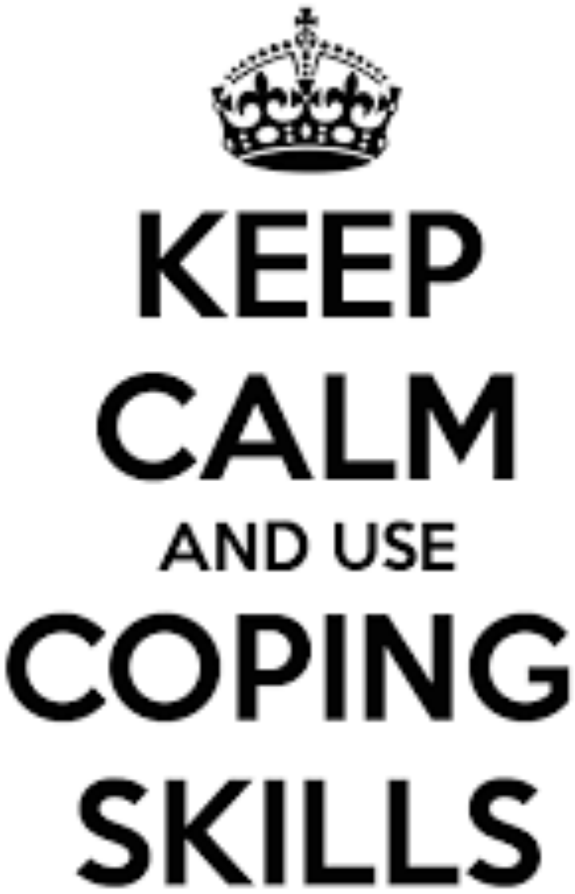
3 Delivery prompt reply

4 Figure out what happened

5 Offer a solution

6 Cut your losses

7 Review and learn



Discussion

- Are there other coping strategies you've found effective
- How do you mentor you team to cope with challenging situations?

Group Activity

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Instructions/Templates/Group Assignments

- Break into assigned groups
- Review your assigned scenario together
- Discuss the scenario as it pertains to three areas of perspective
  - You
  - Your client
  - Your team
- Use the provided worksheet to capture your groups input
- Prepare to report out
- Timing:
  - 20 minutes to review scenario and discuss perspectives
  - 15 minutes for report outs (approx. 5 mins per group)

Break Outs

Group 1	Group 2	Group 3
Constanza	Angie	Anna
Trisha	Meg	Rachel
Kristen	Roxanne	Emily

Scenario 1

Situation

A fairly new client seemingly out of nowhere started to give negative feedback on our work. She communicated during a status call that the quality of our work was not worth the cost and that she had worked with other agencies before and never had an experience like this where the project was completely off the mark.

The client had originally discussed the new project with us during a standing status call a few weeks prior and did seem to have difficulty articulating what her vision for the deliverable was. Because of that we developed multiple content outlines for her to review but the client was frustrated reviewing outlines and just wanted us to write content and make it look pretty. She felt the outlines were a waste of time and money. She communicated her frustration directly to one person on the team during a status call. The TKG team internally regrouped and spoke to the business lead to ensure she was aware of the situation.

Initial Response

Our solution was to have the project lead reach out individually to the client to let her know that they heard her feedback and will put processes in place to improve our project output like detailed timelines and status reports.

Scenario 2

Situation

A long-standing client continuously has last-minute requests that go into night and weekend hours. These requests have incomplete direction and are often sent to different members of the team and are sent either via text or email. This continues to occur despite regular scheduled live meetings and telephone touchpoints which the client infrequently joins and when she does join, she does not provide information or notice of impending projects or upcoming meetings or deliverables we should be aware of.

Our team continues to scramble to accommodate these regular last-minute requests pushing the creative team to turn things around quickly or we often end up often writing and creating slides ourselves to meet the deadlines. The client often expresses dissatisfaction with the result of the requests stating that output was not want she wanted or does not demonstrate strategic thinking and insight.

Initial Response

The project team has informed our senior management and has their support on pushing back on timelines, the team has also implemented more of a formal process like emailed weekly hot sheets, responding to one off requests via email looping in entire team so that all are aware and outlining the deliverable to help establish expectations.

Scenario 3

Situation

A client that we have worked with for some time has a new role. As such, she seems constantly frantic, pushing deadlines, giving incomplete feedback and inconsistent direction and is not always receptive to advice or the perspective that we can provide. What makes the situation trickier is that this client also works as part of our larger client team. This larger team often give us feedback about our client not being forthcoming with them on what she is working on so that we need to communicate to the wider team what she's working on so they can weigh in, and ultimately become the conduit of communication between team members. This adds to the difficulties of potentially creating mistrust with our client as we must forward along what we're doing with her or inform them of the issues we're running into with her which puts us in a very difficult position.

Initial Response

We have regrouped internally and discussed adapting our workstyle a bit to meet this client needs. We now tend to be less reactive and think through the ask before jumping to saying yes and acting. We try to hear her out and let her calm down and try to approach the situation she may be upset about with a collaborative approach. As far as informing the larger team of her projects and actions we set up a bi-weekly brief call with all clients involved and internal teams with one status report that can be shared to provide a general update. This provides a forum for them to connect directly.

Key Learnings/Wrap Up

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Develop a Process for Identifying and Managing Difficult Situations

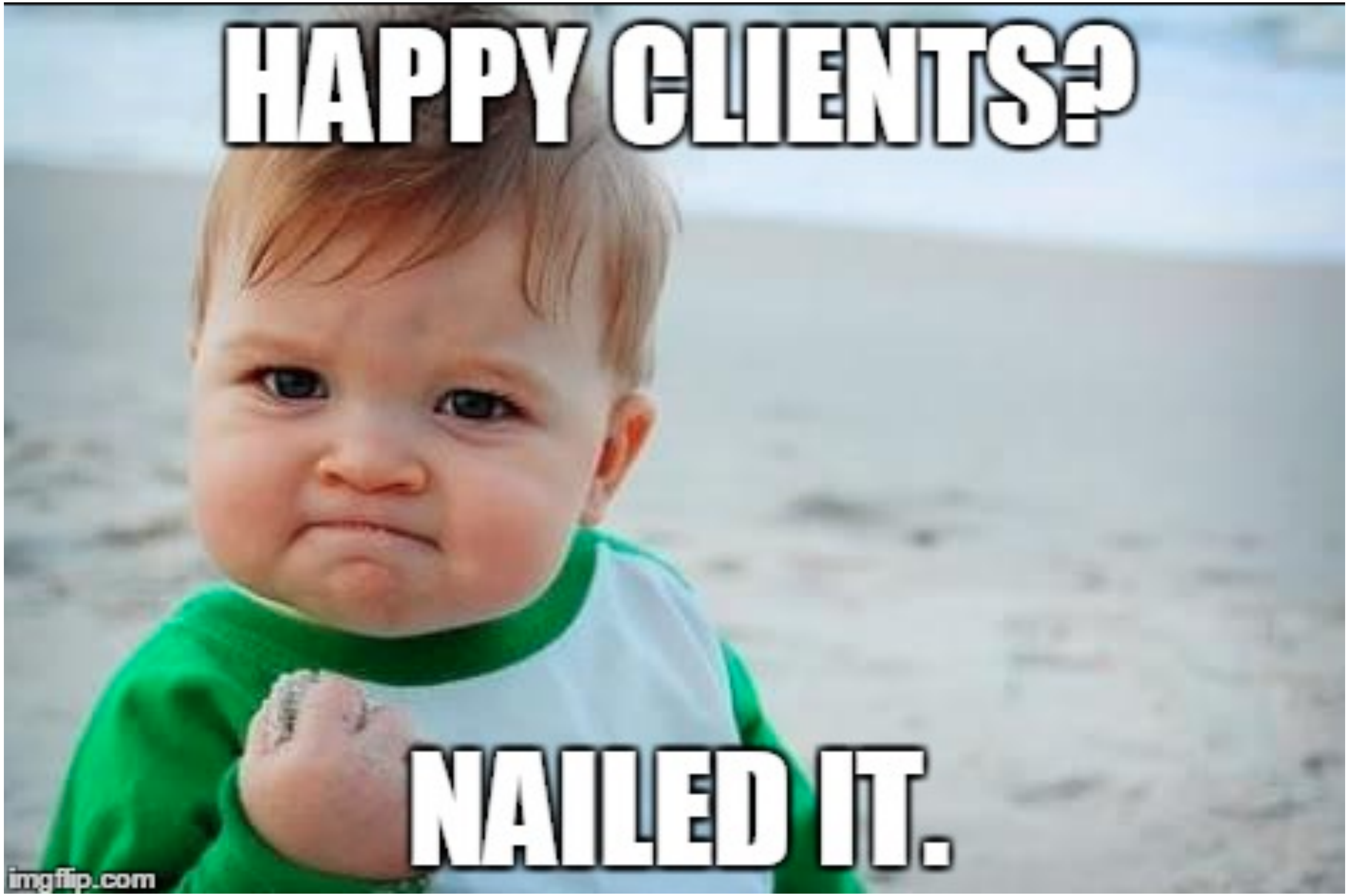
- **Understand the situation:**
  - What is expected?
  - When?
  - Why?
  - What is the agency's role?
- **Reflect on what has happened thus far and what should change**
- **Create an action plan with clear roles/responsibilities**
- **Consider when to escalate and what your asking of the Sr staff**

Thoughts for the future

- Under promise/over deliver
- Reflect: Once the challenge has past, conduct a post-mortem
- Don't compromise your values
- Price it right
- Keep calm and carry on

Coaching Strategies

- Be supportive
- Demonstrate empathy
- Active listening/repeat back what you heard
- Cultivate patience and understanding
- Don’t perpetuate the situation
- Teach them to fish – don’t be so quick to solve


HAPPY CLIENTS?
NAILED IT.
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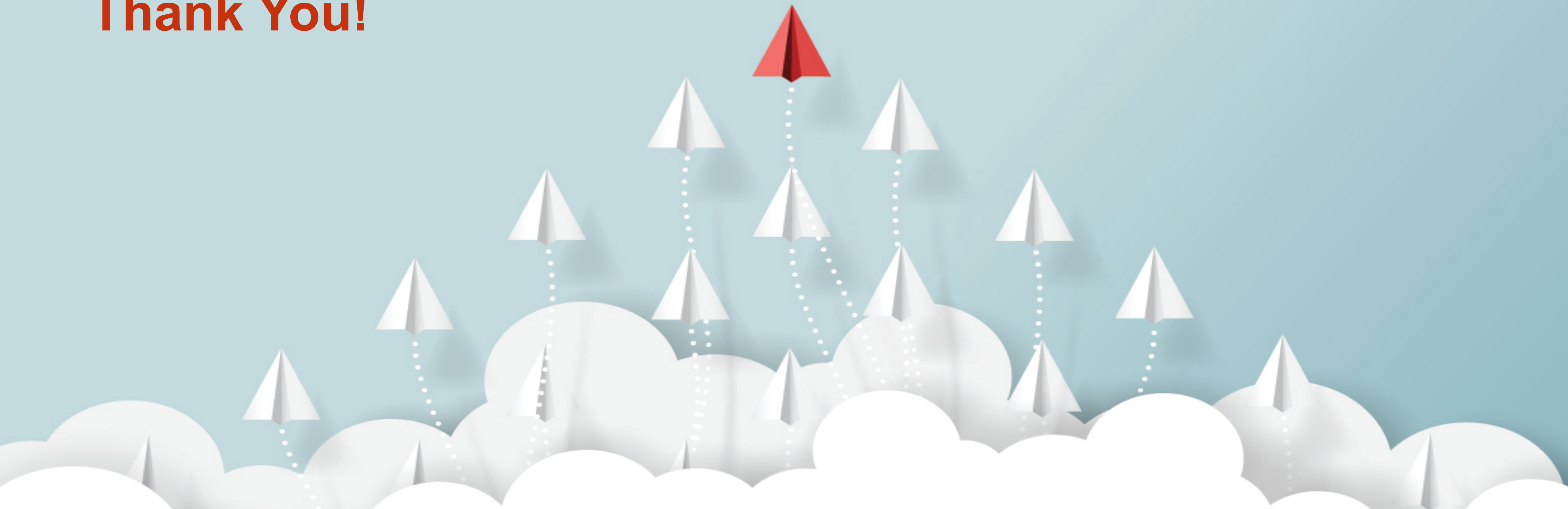
Wrap up

- Meeting notes and additional resources to be sent post-class
- Evening Activity
  - Swing an Axe or just watch the fun
  - 100% Optional event
  - Waiver required for participation

25 Noble Street, Brooklyn

Thank You!



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Addendum

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Discussion Recap

- Identifiers for Personality Types
  - Accountability
  - Responsiveness
  - Engagement

- Warning Signs
  - Internal pleasers
  - Unable to see the big picture (all about the tactic)
  - Changing strategy, no flexibility
  - Pushing boundaries
  - Too reliant on agency

Discussion Recap

- Thoughts on how to manage a challenging client/type

  Group Consensus Type:
  - Ask questions on who will be involved
  - Account for in timelines
  - Empower the client
  - Coach the client
  - Provide talking points
  - Think for them

  Out of Bound Requests Type:
  - Reprioritize
  - Refer to scope of work
  - Team to play good cop/bad cop

Discussion Recap

- Thoughts on how to manage a challenging client/type (continued)
  - Time Pusher Type:
  - Ask them how to prioritize
  - Explain the impact
  - Set boundaries
  - Set expectations
  - Explain the process
  - Involve them in the process
- How to support the internal team with challenging situations arise:
  - Support
  - Set expectation
  - Help prioritize
  - Regroup to align on steps
  - Show appreciation
  - Give permission to push back when needed
  - Divide and conquer approach

Discussion Recap

- What can be driving the client behavior:
  - Uncertainty or lack of understanding of the work
  - Position is a stepping-stone (not where they want to be)
  - Personality
  - Unorganized/reactive
  - Personal live
  - Not promoted/layoffs looming
  - Don't understand the value of sharing information

- Coaching the team with a challenging client:
    - Careful how to react
    - Pause and breath
    - Share information
    - Lead by example and explain

Discussion Recap

- When budget issues arise
  - Don’t hesitate to respond to them
  - Conduct frequent budget review discussion to avoid future issues

- Coaching Coping
  - Review and learn from the situation
  - Explain why the situation was handled that way
  - Listen to their perspective

Leadership Course; Managing Challenging Clients

Helpful articles and resources

- https://hbr.org/2013/12/how-to-manage-impossible-clients
- https://www.practiceignition.com/blog/deal-with-difficult-clients
- https://www.forbes.com/sites/forbesagencycouncil/2017/07/13/how-to-thrive-in-the-midst-of-managing-difficult-clients/#14a57fbe1611
- https://digitalsynopsis.com/advertising/how-to-handle-types-of-clients-guide/
- https://hbr.org/2012/09/how-to-respond-to-negativity.html
- https://www.forbes.com/sites/forbescoachescouncil/2017/07/21/get-your-time-back-11-ways-you-can-better-handle-high-maintenance-clients/#6ea5dd4e78aa
- https://www.linkedin.com/learning/coaching-employees-through-difficult-situations
- How to deal with difficult people TedTalk, Jay Johnson - https://www.youtube.com/watch?v=kARkOdRHaj8

Helpful articles and resources con't

- https://www.workforce.com/2019/05/20/navigating-the-toxic-triangle-of-people-management/

Figure 13.2 The Toxic Triangle