Client readiness to commit to project

June 7, 2018

Attendees**: Linda Anderson**, ESC of the Triangle; **Julie Crockford**, Empower Success Corps; **Craig Kowalski,** ESC of Cincinnati; **Darlyne Koretos**, ESC of Cincinnati; **Paul Moore**, ESC of Central Oklahoma; **Doyle Eiler**, ESC of Central Oklahoma; **Carol Hodnett**, ESC of the Treasure Coast; **Michael Towers**, National Executive Service Corps; **David Factor**, Executive Service Corps of Southern CA; **Lilly**, Executive Service Corps of Southern CA; **Jeramiah**, Executive Service Corps of Southern CA; **Julia Fischer**, Executive Service Corps of Southern CA**; Jan Burrell,** 501 Commons, **Susan Loucks**, ESC, Bayer Center for Nonprofit Management, Robert Morris University; Burt Hering, Executive Service Corps of Houston; Jim Rudder, Executive Service Corps of Houston, **Kathy Leone,** Southern Florida Institute of Aging.

What do you do when a project/client stalls and client hasn't signed the consulting agreement?

Susan: We have no written practices but it's a bit of a fine line that demonstrates their commitment. It's a lot to ask; not customer friendly. I've had personal experience with people who have disappeared on me. Put language in contracts to counter that – about communicating better. I could get back to potential client and remind them that they're not getting their value out of the contract.

Craig: We never put a timeline on signing the contract. What do you think about that?

Susan: Maybe after 90 days we would have to renegotiate contract.

Julia: we do a lot of leadership coaching contracts. We get a lot of calls from HR people who say they have issues. She asks: what qualifies this person for this role? May turn out they are rainmakers who have been put into this job. Coaching is a transformational contract and sometimes we find that they are not the right person for the job. Another question we ask: what else is going on in the organization? Helps me know am I sending a consultant out who can make a difference. Especially relevant if we get more than one contract. There might be some organizational issues that may lead light. Sometimes the consultant will shadow the client to see how they go about their daily business. Check in with person. What recent changes has the organization made? They may think the problem is one thing when it may turn out to be more systemic. Ask questions that reveal if this person has a holistic view of the organization.

David: We see coaching as the core of our business but you can ask the same about consulting projects. Narrow focus vs. broad focus.

David: What didn't work for you?

Burt: We always take with a grain of salt what the client submits as a request for assistance. After talking with them in many cases we convince them they need something else. Once you have a contract you have to follow the scope of work in the contract unless you redefine the scope.

Craig: what do you do when the client doesn't respond?

Burt: put project on hold or terminate. Problem is if they already paid, how do you handle?

Julie: putting a project on hold. We did that with a $10K strategic planning project last year. We can't do more . . . it was a hire they needed to make (an ED) We put project on hold but then restarted when they hired one. Consultants frustrated but it was the right thing to do.

Craig: we've done short projects when client doesn't know what they need since they weren't willing to do a complex project.

David: gee, you want to do everything? Let's do short projects b/c we don't trust clients not to go AWOL.

Julie: If a project is mainly coaching, what is your price range?

Julia: Typical 12 months leadership coaching projects meeting 2x month for several hours, typically $2K. We might boost a little if it's a complex, large organization.

David: not often but there have been cases where they lose steam in the middle. In one project the circumstances had changed so much that we changed consultants. Everybody wanted client to win and have the consultant happy. We've made some shifts on larger projects where we change the equation.

Craig: We are careful to get a real strong scope before the project starts. I'm always leery when there's no questions on the contract.

Susan: if you have a client that's not willing to engage or lacks the steam to go ahead or doesn't understand the organization holistically.. . Sometimes there's resistance. Noting tension. Balance to getting to know an organization vs. moving forward on the project.

Jim Rudder: The agreement for larger projects will state what responsibilities are for the client and what ESC responsibilities are. We explicitly state what could occur if there's a one week delay, etc. You might consider things like "if I don't get a response in x amount of time, the contract is null and void."

David: We try to hold the relationship because things happen at nonprofits. If they've paid us we don't want to give money back. We try to help them in another way. Unpackaging the project. We try to figure out what they need. We try to do things in a single package when we can.

Burt: One of the problems we have seen is t's very hard to get a client to agree to a project if they're not ready for it. If they're not ready, they won't do it. As you said about unpackaging how do you get something going to get our foot in the door so we're there when they really need us.

Paul: One of our observations – it seems like some of you are flush with business. We go out and meet with clients and it seems like it takes a long time to get them to the alter. Some of you use workshops. Does that lead to business?

Susan: I don't think it drives our business but we have "clinics". We have consultants who have a specific background. We give 1-2 hours. No pre-work. We had one client who came to a lot of clinics and I said "it sounds like you could use a consulting project." $100 for clinics – one client; one consultant.

Craig: sometimes client becomes intimidated when they see the contract and they just sit on it. Any way to get around that?

David: on a couple of occasions we talked about a strategic plan. If they weren't ready for that, we asked: "How about if we work on an operational level for day to day first?"

Doyle: There is a real challenge because of (the word) "change". When you talk with them about what might happen it involves change. When it's over, something's going to end up being different. I just sense EDs are risk averse. Whole project of change is scary. How do you get past that?

Susan: use a different word other than "change." Growth or something else.

David: Julia just said "implementation." We'll work with you through the implementation.

Paul: How do you implement implementation? Is it a separate contract?

Julia: 9 month strategic planning project – 2-3 (missed whole thing due to noise on the phone line) Let's get some traction on doing .

David: We use our own consultants help us (ESC of Southern CA) with our strategic plan. It has really helped us with accountability. It's an enormous help.

Julia: Clients who haven't done full strategic plan. I will send a sample strategic plan so they can see how it's done. It will get clients excited.

Julie: I agree. It moves the ball from concept to action. It's really going to be specific and I can see how others can act on the plan. Practical document.

Craig: When the client sees it's not going to be a binder (the strategic plan) but just a document or spreadsheet.

David: here's an offer: if any of you are talking with your client and you don't have local clients to talk with, I am offering to talk with them about what it's like.

Julia: We created one sheets for all our services. What are the benefits and what are the pain points? (see samples attached to notes.)

David: Remember that you have help throughout the ESCs.

Kathy: Thank you for giving us access to resources.

David: any wisdom on scaling back projects mid-stream? We have to pull back. Any information of how to have that conversation?

Susan: it's a shared responsibility. We had a client whose attention was not on the project. I tried everything for a long time. They wouldn't read or respond to emails or resources I sent them. I wanted the client so bad, but they weren't ready. I had to let them go. These conversations lead to integrity. Never heard back from them.

Michael: We do a tremendous amount of follow up "did you do this; did you do that."

David: one or two where clients disappear, and we felt that we had to return their down payment.

Michael: We had a merger of two healthcare agencies fall through. We asked them what else they wanted to do with us? I am now working with their controller on something else. That works. Need help with anything else? Ended up doing two years of audits.

Craig: Yes, we will go ahead if one project doesn't work; we'll do something else they need that we can provide.

David: Since we're in the nonprofit world, it's the value we're providing. If what we're providing doesn't work can we provide help differently?

Michael: if we had more IT consultants we could do more projects in that area.

Darlyne: 501 Commons does a lot of IT work. Contact Nancy. Maybe you could use ESC-US's new "virtual service."

Jan: we have a whole lot of IT volunteers, as well as paid consultants. Sales Force rates are good.

David: If we had IT or something else in our back pocket, that would be useful. We could always fall back to plan B.

Jim: if you are interested in having a virtual project, I work with the business school at the university. We have students who do IT projects that can do that. Most nonprofits need support for their websites and websites are fundamental to all nonprofits. We just ended a semester and had 33 projects that went through.

Michael: great news.

Jim: We charge $250 admin fee and we do run many projects and we have ESC mentors who don't necessarily have IT background. We do need a mentor and we have to make sure the student does what they're supposed to do and the nonprofit does what they're supposed to do. Contact me if you're interested: ratj@comcast.net. Or put a request in for the University of Houston and it will come to me.