The Big Picture
Creating an Ongoing Client Relationship

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We received a call from Judith, an information technology (IT) executive in search of facilitation training for her team of project managers. We explored in general terms what she was seeking and arranged a meeting to talk in more detail about her needs.

Arriving at the meeting prepared with materials and questions, we began our discussion with the specifics of the requested facilitation class. We then asked Judith how her team would use the facilitation tools that we would be teaching and what problems she hoped these skills would address. During our meeting, Judith and we exchanged ideas, experiences, and methodologies as we established rapport and began to build a foundation of credibility and trust. It became clear through the interview that besides general facilitation, Judith wanted her team to learn how to apply those skills to specific IT sessions.

When we asked about our competition, we learned that we knew both of the other candidates since we were all part of the local facilitator network. We told Judith that although we wanted her to choose us, she would not go wrong with any of her choices.

Later that afternoon, Judith called requesting some information on mind mapping. We quickly pulled together and e-mailed some resources, then followed up with a telephone call.
We delivered our proposal to her within a few days, recommending two classes and follow-on coaching for maximum success. Shortly after, she accepted our proposal, and we delivered the classes. Two weeks later, we met with Judith to debrief the classes, review the evaluations, and discuss next steps.

At a celebratory dinner, Judith shared that she had received many positive comments about the training. She had told a number of people, both inside and outside the company, that she thought our training would be of great benefit to them. Judith also recommended opportunities to showcase our services, such as speaking at the local Project Management Institute meetings. During the course of the conversation, we also explored her current challenges. We brainstormed a variety of solutions, identified where we could provide assistance, and recommended other resources for services that were beyond our expertise.

At a subsequent luncheon meeting, we agreed that our interactions were so rich that we wanted to take our collaboration to a new level. We discussed submitting a proposal to deliver a joint session on facilitation and project management at the 2004 IAF conference.

Since that time, Judith has referred colleagues to us and asked us to submit another proposal for both a repeat of the course we delivered and two additional courses.

As we continue to keep in touch with follow-up telephone calls, e-mail, and occasional lunches, we offer Judith assistance in defining issues and brainstorming solutions. We also serve as a sounding board for her ideas and make referrals to resources to meet her specific needs. When other managers ask her for assistance with their challenges, she does not hesitate to recommend us because our continued, productive contacts have kept our name and services fresh in her mind.

**CREATING THE BIG PICTURE**

Developing a relationship with clients based on trust and collaboration goes beyond working with them to prepare for a single workshop or series of sessions. The skills we use to design and facilitate sessions—clarifying mutual commitment, customizing the session to meet the client’s needs, emphasizing collaborative values and processes, deciding which participants to include, and reaching understanding on scope, deliverables, roles, and responsibilities—do not merely result in successful sessions.
We use these same skills to establish rapport, credibility, and trust with our clients as we help them look beyond the current engagement to the big picture in which they define their problems from a comprehensive organizational point of view. It is through this process that we establish mutually beneficial partnerships that provide our clients with a trusted adviser to help them define their problems, explore possible solutions, and refer to appropriate resources (books, courses, and other people). These partnerships provide us a source of repeat business as well as positive referrals to other potential clients.

As we use our facilitation skills to help our clients broaden their view and fit their immediate needs into their Big Picture, we make it a point to:

- **Be** prepared.
- **Interview** effectively.
- **Gain** trust.
- **Practice** empathetic listening.
- **Invest** in quality.
- **Communicate** intentionally.
- **Think** about clients.
- **Understand** needs.
- **Recognize** challenges.
- **Evaluate** satisfaction.

**BE PREPARED**

Preparation is the backbone of our facilitation. (See Chapter Four.) The preparation we do at the front end of a facilitation session—understanding the objectives, interviewing the client and participants, crafting sample deliverables, and designing a suitable agenda—lays the foundation necessary to achieve the desired results.

That same focus on preparation is important in managing client relationships and helping clients to see their challenges within the context of the Big Picture. Being prepared for client interactions before and after the session is as important to creating an ongoing client relationship as being prepared for all that we do during the session. Being prepared builds trust, nurtures the client relationship, and develops clients’ confidence in our ability to meet their needs.
As we prepare for each interaction with our clients, we determine the objective of the client meeting and design a suitable agenda for accomplishing the objective. For some of our interactions, we may conduct research on the Web, review periodicals, read company materials, and talk with others in order to learn about their company and industry; identify legislative, economic, and environmental issues affecting their business; and become aware of what their competitors are doing.

Just as preparation pays off in a facilitated session, there are many dividends to the preparation we do to nurture client relationships. The better prepared we are, the easier it is to ensure that we achieve the objectives we set for our client relationships: ongoing partnership, additional work, and positive referrals.

INTERVIEW EFFECTIVELY

When we ask facilitators what their most versatile tool is when facilitating a session, they often answer, “Questions.” We ask questions of potential clients to obtain the information we use to determine whether to accept an assignment and, if we do accept it, how to proceed. During the session, we ask questions to get information, clarify what was said, elicit more detail, and determine if we have consensus.

Well-phrased questions assist clients to identify issues, concerns, and goals that are broader than our current assignment. By taking a Big Picture view, we encourage clients to explore both the scope of a single engagement and the way it fits into the organization’s initiatives for the year. In addition, questions are excellent tools to learn about circumstances that currently exist elsewhere in the company and explore in what other ways we may be of service.

We have found that using the journalist’s questions—who, what, when, where, and how—is the most effective way to help clients identify issues because these questions provide data with which we can work. We tend not to ask “why” questions because they are likely to put people on the defensive and often produce one of two nonproductive answers: “I don’t know” or “Because.”

We ask questions to determine what is in place to support the successful integration of the product of the session. Questions that explore obstacles to success, bottlenecks, and emerging problems reveal information that will assist us in maximizing the results of the session and surface additional areas in which our services can provide valued assistance.

Questions designed to explore the likely impact of industry trends and practices on our client expand the perspective to the Big Picture. Through our questions,
we can discern if it is important to the client to be on the cutting edge in his or her industry, what it would take to achieve that end, and how we might assist in reaching that goal. By enlarging our clients’ perspective to the industry as a whole, we help them to anticipate and plan rather than react.

Many of the same questions that we use to ask clients about a specific engagement can be broadened to help them focus on the Big Picture. Examples of Big Picture questions include:

- What are the key issues and problems with which your company is dealing?
- How do these affect your department?
- Who are the stakeholders outside your department who are affected?
- How will the resolution of these issues affect other teams, departments, and divisions in your company?
- What are your competitors doing regarding these issues?
- What is a trend in your industry that you believe will affect your company? When did it emerge?
- What areas need improvement to stay abreast of the developments in your industry?

A good resource for session-related questions that could be broadened into Big Picture questions is *The Skilled Facilitator* (Schwarz, 2002). Schwarz identifies four areas—process, structure, organizational context, and behaviors—for which he has developed a series of questions to help diagnose the client’s issues and determine whether to work together. For the Big Picture, we can identify which of Schwarz’s questions are appropriate for the particular client’s situation and broaden their perspective beyond asking about a specific engagement. Asking about a session, Schwarz uses the question, “In what ways does the organization help or hinder the group?” (p. 279). The Big Picture question, “What is it about our organizational culture that has a negative impact on our people and puts them at risk?” could help a floor covering company focus on what is happening within the entire company that results in the manager of every one of their stores suffering a heart attack.

Whether exploring a single engagement or managing a productive client relationship, effective questions assist us in putting clients in touch with information we can use to support them in achieving their objectives.
GAIN TRUST

In our facilitated sessions, we strive to build trust in order to maximize the people, the process, and the product. (See Chapter Six.) Trust creates a safe environment that enables the participants to open up and share freely without criticism. We build trust by providing operating agreements on communication, respect, and confidentiality, as well as using inclusive techniques to encourage broad participation.

When we have created a relationship that is built on trust, clients are more willing to explore their problems and challenges with us as we address their Big Picture.

We establish our trustworthiness by demonstrating reliability, interacting openly, being authentic, respecting confidentiality, honoring our commitments, and operating with our clients’ best interests in mind.

When we share highlights of similar engagements, we demonstrate a successful track record and build credibility. Additional ways to build trust and show clients that we value them and their time include these:

- Maintain regular contact during all assignments with frank and periodic communications on progress.
- Return calls and e-mails promptly.
- Be punctual for meetings and telephone calls.
- Meet without interruptions from our cell phones and pagers.

While it takes time to build our clients’ trust, it can be destroyed very quickly. If we find that we have made a mistake, cannot meet a deadline, or have a problem in fulfilling a commitment, we do not ignore it. We have an honest and timely discussion on how we will remedy the situation.

Trust grows as we demonstrate our commitment to the client’s success in ways that do not benefit us financially, such as suggesting an alternative to a facilitated session or recommending another consultant for a particular service we do not offer. Although it might seem as if we are “losing the work,” we are actually strengthening our client relationship and potentially setting ourselves up for future opportunities.

In the Big Picture, when both the client and the facilitator bring trust, shared respect, and understanding to the table, a long and mutually beneficial relationship will result.
PRACTICE EMPATHETIC LISTENING

When we are facilitating, we listen with our ears and our eyes for both the spoken and the unspoken communication. By paying attention to the words, tone of voice, body language, and gestures, we enhance our understanding of what is being said, how the client feels about it, and what lies beneath the words.

Empathetic listening, a structured form of listening and responding, is a powerful tool that we use as successful facilitators and client relationship managers. Empathetic listening has several benefits:

- It requires people to listen attentively to each other.
- It avoids misunderstandings as people confirm that they understand what the other person has said.
- It focuses the listeners on the feelings and needs beneath the words.
- It encourages the clients to open up and say more.

Our questions not only evoke answers about the specifics of the assignment, they also produce information on issues that are important to their Big Picture. Thus, we broaden our scope as we listen for potential areas of difficulty as well as for departments, divisions, or allied operations that could potentially use our services.

In effective relationship management, we not only listen for information that will heighten our effectiveness with the specific engagement, we also listen for those things that relate to the Big Picture. We created the empathetic listening model for use in our course, “The Consciously Competent Facilitator,” because it provides the means for facilitators to address the needs and the feelings behind the words used by the participants (see Exhibit 1.1):

Listen. Put all attention on what the client is saying, and listen for statements that relate to the company, the industry, and the latest trends. Example: The participant says, “Why are we bothering to work on this plan? It’s just like all the other plans we’ve done. It won’t get implemented, and we’ll just have wasted all this time!”

Paraphrase. State in different words what the client has said. This avoids misunderstanding because we know immediately if we both understand what was said. Example: We might respond, “It sounds as if you think we’re wasting time working on this plan because the company is unlikely to put it into operation.”
Empathize. Identify and reflect the needs and feelings heard beneath the words. Example: We might ask, “Are you frustrated because you feel this is just one more plan that management will ignore?”

Question. Formulate a question that probes for more information or leads to action that will address the issues we heard identified. Example: We might ask, “What can we do to help get this plan implemented?”

Marshall Rosenberg (2003, p. 127) underscores the power of empathetic listening in his book, Nonviolent Communication: “Empathy lies in our ability to be present.” This ability to be fully present with clients and hear the needs and feelings behind their words takes our interaction to a deeper level through which we build partnerships.

INVEST IN QUALITY

When we facilitate during a project, we commit to doing what needs to be done with excellence. Our investment in a quality product includes meeting the session objectives and deliverables as well as being honest with the client about what we can and cannot do within the constraints of time, budget, and resources.

Clients are more inclined to explore their Big Picture with us when they have already benefited from the quality products we have delivered. Producing with excellence what the clients have requested is a springboard to repeat business with these clients, as well as their referrals to other potential clients.
To build our clients’ confidence in us and strengthen our relationships with them, we do what we promise within the agreed-on time and budget and deliver a quality product each and every time.

Delivering a quality product includes providing suggestions to our clients for ways to effectively implement the results of a session as well as minimize or eliminate barriers that may have surfaced during the session. Quality produces satisfied clients. Performing with excellence positions us for trusted adviser status and can lead to additional work and referrals.

**COMMUNICATE INTENTIONALLY**

When we facilitate, we communicate with intention. We have a clear purpose in mind, use terms that are part of our client’s culture, ask well-phrased questions, listen empathetically, and accommodate different thinking and operating styles.

The ability to communicate intentionally with clients is essential to building dynamic, ongoing relationships. When our communication is clear and mutually understood, we minimize the chances of misunderstanding and maximize the possibility of achieving the desired results. Since all people do not send or receive information in the same way, we adapt our thinking and operating styles to those of our clients.

We understand, respect, and appreciate diverse thinking patterns and respond to each appropriately. By listening to our clients’ words and watching their behavior, we learn whether the way they process information is auditory, visual, or kinesthetic. We then speak in terms to match their thinking style. Auditory thinkers engage in the exchange of ideas and typically say something like, “I hear what you are saying.” Visual thinkers use illustrations and graphics and are likely to say, “I see what you mean.” Kinesthetic thinkers prefer to take action and may say, “Let’s get this done” (NLP Learning Systems, 1993, p. 7).

In addition to using different thinking styles to process information, clients have different operating styles. Although they may demonstrate characteristics from several operating styles, one of the following four styles will be dominant (Wilson Learning, 1987):

*Driver.* Action oriented, brief, and gets right to the point. Drivers do not like detail and consider small talk and personal exchanges a waste of time. They cut to the chase, make decisions quickly, and get things accomplished. Adapt to this style by talking in bulleted points and quickly getting to the bottom line.
**Expressive.** Articulate, enthusiastic, high energy, and influences others easily. They are people centered and do not like a lot of detail or working alone. They think out loud and are constantly revising as they speak. Adapt to this style by being friendly and focused and keeping the conversation on track. Otherwise, they are likely to take it in a different direction.

**Amiable.** Responsible, reserved, logical, cooperative, patient, and persistent. They take all the responsibility on themselves and will not delegate. These good listeners do not like fast change and want to be treated fairly. Adapt to this style by drawing them out and allowing time for ideas to incubate.

**Analytical.** Organized, methodical, quantitative, critical thinkers who want all the facts and great detail. They are perfectionists who seek detailed answers. They are precise, controlled, and reserved, and they resist change. Adapt to this style by giving them information in writing and providing time for them to analyze and process information.

Effective communication with clients requires clarity on what we plan to accomplish during our client interactions, awareness of the information our clients are seeking, and knowledge of how to deliver it to match their thinking and operating styles.

**THINK ABOUT CLIENTS**

In addition to conducting specific research for an engagement, we keep the session objectives in mind as we review literature, engage in professional discussions, and attend sessions at conferences. This helps us recognize and apply new facilitation techniques to address issues effectively, make the session more participative, and create positive results.

As our clients see that we are continually thinking about their Big Picture needs, they are more likely to remember us when an opportunity arises for facilitation or other consulting services.

We keep our clients’ Big Picture needs in mind as we read newspapers and professional magazines, peruse conference flyers and book reviews, participate in meetings and other networking experiences, and engage in activities that could provide information pertinent to our clients.

We use this information in a variety of ways to enhance our clients’ operations and maintain our connection. One way is simply to forward the information, such
as telling them about a conference. Another is to customize the information to meet client needs, such as recommending specific workshops within the conference. A third is to use this information to help them expand their thinking such as recommending we copresent at the conference.

We use other techniques as well to demonstrate that we continue to think about our clients:

- Create a short newsletter with information pertinent to their needs. Include contact information and a listing of our services. Use success stories with quotations from satisfied clients, especially if these emphasize new or different services. Consider an e-newsletter that is cheaper and faster than printed newsletters.
- Send article clippings, book reviews, and copies of white papers with a personal note. As appropriate, highlight certain portions or add comments and suggestions.
- Offer to speak, or help identify speakers, for company meetings or company-sponsored events.
- Write specific articles or white papers for a group of clients. One consultant commissioned a bimonthly article aimed at her CEO clients; another sent a more general article to all clients.
- Send a regular e-mail with tips or quotes that apply to our client base.
- Send birthday or holiday cards. With a preprinted company name, a note and hand-addressed envelope adds a personal touch.

Taking the initiative to stay in touch can include any or all of these techniques, as well as other approaches such as taking clients to lunch or dinner, making periodic telephone calls, and forwarding relevant e-mails. The question is not, “Which of these techniques shall we use?” but rather, “How can we most effectively demonstrate to our clients that we’re thinking about them and their Big Picture?”

UNDERSTAND NEEDS
As facilitators, one of our main tasks is to help the group achieve a common understanding of issues and resolutions. Some of the things we do to accomplish this are paraphrase, probe for more detail, and document for clarity. We also invite participants to write their own concerns, ideas, and issues on cards and then group the cards to identify common themes.
In effective client relationship management, understanding our client’s immediate needs and how they fit into the company’s Big Picture enables us to help them address both. With this information, we are not only able to be more effective on our current project, we can also identify other areas where our services can provide added value to the client.

We stimulate our clients’ thinking when we ask them about their immediate, long-term, and Big Picture needs, using questions such as these:

- What problems are you experiencing that led you to believe you need a facilitator?
- Imagine you have addressed these problems. What has changed as a result? How does the department work now?
- What conditions exist in the company that must be addressed to keep from interfering with the success of this undertaking?

The answers to these questions enable clients to understand that by focusing only on the immediate situation, they resolve the pressing issue yet run the risk of not adequately addressing issues that have a broader scope. For example, a client who is problem-solving an issue may be too narrowly defining the problem by looking only at his or her own department without considering the interdepartmental impact.

As we come to understand the full extent of our clients’ needs, we are able to suggest services that would best meet them. Some of these services we will deliver ourselves, and others will be provided through our network of consultants. To build our referral base of consultants, it is important that in addition to networking with facilitators, we build solid relationships with people in related services.

When we recommend a colleague to provide services for our client, we make a point of debriefing that person following the completion of the work. The focus of this discussion is to identify issues that emerged that require attention and might result in additional work for us.

Taking a Big Picture view means that we have our client’s total needs in mind, understand the long-term objectives, and provide the vehicles to achieve them.

**RECOGNIZE CHALLENGES**

When we interview clients or participants about a session we will be facilitating, we ask if there are any issues that might surface, such as hidden agendas, turf conflicts, or individual or organizational challenges. By getting this information in advance
of the session, we avoid surprises and are able to deal more effectively with dys-
functional behavior that may arise from these issues.

Being aware of potential challenges facing our clients can help us better under-
stand their Big Picture and provide alternatives for minimizing or eliminating those
challenges.

We use the journalistic questions with our clients to encourage conversations
that focus on where they are, where they want to go, and possible barriers they may
encounter.

We stimulate their thinking about potential challenges with information gath-
ered from our research on their company, industry, and competition. We also re-
ference our experience with similar engagements and identify the similarities and
differences in the challenges.

During a session, we listen for companywide or departmental issues that could
sabotage the work that is being done. We communicate these potential issues to
our client and encourage that they be addressed to maximize the chances that the
work will be successfully implemented. In addition, we share what we have heard
about challenges outside the scope of the session and suggest ways in which they
can be dealt with in a timely fashion.

This approach instills confidence in our clients that we are committed to un-
covering their challenges, able to meet their needs, and prepared for the unexpected.

EVALUATE SATISFACTION

Having participants evaluate our performance at the end of each session provides
us valuable information. We learn if the participants thought we achieved the ses-
session’s stated objectives, if the process worked for them, and if we were effective in
managing the group. We use this information to note our strengths so we repeat
them and identify our areas for improvement so we can modify them.

Satisfied clients produce additional work and positive referrals. Monitoring our
clients’ level of satisfaction on an ongoing basis positions us not only to exceed our
clients’ expectations on a specific engagement, it also demonstrates our interest in
helping them succeed at the Big Picture level. Their feedback provides us with a
realistic picture of the opportunities for additional work and their level of will-
ingness to be a referral source.

While client satisfaction for a specific engagement is measurable through the use
of evaluation forms, relationship satisfaction is more informal and not as easily
measured. Actions and behaviors provide clues to the level of our clients’ satisfaction with the relationship. We conclude that our clients are satisfied when they:

• Seek us out for additional guidance and support.
• Use us as trusted advisers to brainstorm solutions to challenging issues.
• Respond positively to suggestions for collaborative work.
• Are responsive to periodic invitations to lunch or dinner.
• Initiate telephone calls and get-togethers.

By providing a listening ear, exchanging ideas, and operating with their best interests in mind, we work toward becoming a trusted adviser—the person to whom our clients come when they are in need.

When clients are pleased with our work, they are excellent sources for future business. By maintaining contact with clients following our successful engagement, we stay abreast of their issues and problems. This information helps us determine what additional services to offer to them.

CONCLUSION

Developing relationships with our clients that are built on trust and collaboration is vital to our continued success as facilitators. As we use our facilitation skills to assist clients to operate effectively in their Big Picture, we strengthen our relationship and position ourselves to provide service beyond a single engagement. By partnering with clients, we maximize the likelihood of achieving success, both theirs and ours.