Managing Expectations:
Will Clients *Ever* Fully Understand?

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So . . . you are the coordinator or analyst for a competitive intelligence, data analysis, benchmarking, market research, corporate development insight group. Yes, I know that is a really long department name, but many business intelligence practitioners get pulled in so many directions that they just really don't know what to call themselves anymore. You're at your desk when your *bat phone* rings. It's your chief marketing officer (CMO).

After scribbling notes outlining her request for information, you clarify the projects scope. The CMO wants to look at six privately held companies in five different countries and find out everything about them including specifically identifying their sales, operating costs, margins, long-term strategic initiatives, critical success indicators, capacity, production percentages, names of all suppliers, ERP systems they use and their pricing model. The CMO tells you that the information is needed in two days and the budget for the project is under $1,000. You laugh and hang up . . . at least that is what you really want to do.

Do you regularly deal with this type of unrealistic fire drill request? Does your internal client fully understand or even care about what it will really require to complete the assignment? How do you manage their expectations, especially "C-Level" clients?

In this article I summarize some practical experiences and views on how to better manage the expectations of CI clients or requesters that I've shared with select SCIP members during a training session at the annual conference in Anaheim, California earlier this year.

CI USER DISCONNECT

Why does frustration and at times mutual disrespect develop between a CI group and clients? As a CI manager, why do you sometimes dread thinking about receiving another project when in fact you should be thrilled because it means your group is getting noticed? On the flip side, why do your clients feel disappointed or shortchanged when they read your final report?

I believe it all comes down to how well the client understands:

- what actually can be delivered
- the research gathering process
- when results can be expected
- what it will cost

It also depends on how well the CI facilitator understands exactly what the client is truly expecting for his investment.

Why should we manage expectations? We must first ensure that the real project goals are met. Many times the initial project goals or key research questions are not the issues. For example, when a senior executive asks what a competitor's key strategy is, you answer, "Gain market share." What they may really want to know, however, is how that competitor plans to gain that marketshare. The executive wants the details, the tactics behind the strategy, even though that's not necessarily what she technically asked for.

By managing expectations, you also develop mutual respect. The CI analysts better understand why the information is needed, and how it will be used. The requester understands the ease or difficulty of developing the desired intelligence.

DEVELOPING REASONABLE EXPECTATIONS

So what happens if we don't practice expectations management? Chaos! There are lots of fire drills. You're

Clients:

Are you the type of internal client who makes your initial information request and doesn't make yourself available for clarification questions that arise throughout the project?

Are you an expert, thus allowing you to partner with the CI group to share your knowledge and know that doing so will likely result in a better product?

Are you a client that wants frequent communication so that you know what is going on with their projects every day?

Are you the person making the request but not the actual client of the information?

CI Managers:

How well do you know your clients?

Have you taken the time to meet them face-to-face (when possible), rather than just communication via phone and email?

Do you know who the other stakeholders of the research are? It's important to understand the type of clients you work with so that you can adapt to their communication style.

- Agree on realistic deadlines before work starts.
- Seek perspective, not precision.
- Communicate regularly during the project.
- Pick two goals: good, fast, or cheap.

DEFINE YOUR PURPOSE

One of the first things a BI function must make clear to its internal clients is why the BI unit exists. Ask yourself: what value does the CI group provide? Create a purpose statement that includes a specific description of the CI services your group offers.

The CI group doesn't have to be everything to everyone. If you don't want to be viewed as the department of last resort that receives only those 11th-hour extremely difficult, quick hit, no budget research requests, then stop creating them by educating your internal clients.

Depending on the developmental stage your CI group is in, you may have to address fire drill projects to score some successes and get executive buy-in. But you also have to be careful not to set yourself and your team up for failure and give a client—especially a first-time client—a bad experience. If the CEO mandates that your CI group perform a specific task, you will have less freedom to challenge the request (in which case I suggest the CEO reads "The Five Temptations of a CEO" by Patrick Lencioni, published in 1998 by Jossey-Bass, a Wiley Company).

It is still your responsibility to convey that your CI group functions much more efficiently and effectively under a slightly different environment. If you are making an exception to your normal services, make it known that it is an exception and not the norm.

PROFILE KEY CLIENTS

It's also important to get to know your clients. Profile them. For those clients reading this article, profile yourself.

There are four basic communication styles: analytical, driver, amiable, and expressive. Understanding the primary and secondary style of your internal clients will go a long way toward being able to better manage their expectations and promote two-way communication. While knowing your own communications style is interesting, it is even more important is to understand a client's communications style. It allows you to flex your method of communication and to make the other person feel comfortable and to form a quicker connection to that person so that they can best receive the message.

Table 1 illustrates the personality traits often associated with the different communication styles. Profile yourself and any of your clients to identify their primary and secondary style. Simply circle the attributes in each of the four quadrants that most closely reflect the person's behavior. The

viewed as not having your act together. CI staff is unclear of their roles and what exactly they are to deliver and by when.

Clients begin to want the impossible; they believe it to be possible because you have not told them differently. Most people are reasonable and realistic when something is intelligently articulated to them. But if no message of reasonable expectations is conveyed, the assumption is that what is asked for is achievable.

Not managing expectations results in poor communication, your CI people miss something, and the client ultimately gets no unique experience from calling your CI group. The net result of not managing the expectations of clients is unhappy clients. And negative words regarding the reliability or lack thereof of an internal CI group can spread fast, especially among senior executives. You must keep your clients happy or you will not get repeat business and your CI group will likely fade away.

There are several key activities a CI group must consistently do to better manage expectations and develop a consistent win-win relationship between BI users and providers:

- Accurately convey the purpose of the BI group.
- Profile key CI clients.
- Develop a specific scope at the beginning of the project.
- Discuss project feasibility upfront.

TABLE 1: BASIC COMMUNICATION STYLE

ANALYTICAL : "Be Accurate!"

problem solver	organized
factual	orderly
consistent	persistent
accurate	precise
perfectionist	enjoys instructions
sensitive	logical
cautious	impersonal
scheduled	detailed
conscientious	inquisitive

DRIVER: "Be Efficient!"

goal driven	takes charge
independent	seeks power
action oriented	persistent
competitive	judges quickly
purposeful	industrious
serious	controlling
bold	self-reliant
excitable	productive
strong willed	firm

AMIABLE : "Be Agreeable!"

enjoys popularity	loyal
sympathetic	adaptable
calm	dry humor
sensitive feelings	tolerant
nurturing	patient
cooperative	good listener
personal	enjoys routine
respectful	relational
non-demanding	thoughtful

EXPRESSIVE: "Be Accurate!"

enthusiastic	inspirational
fun-loving	spontaneous
intuitive	likes variety
initiator	enjoys change
creative	motivator
optimistic	ambitious
takes risks	friendly
mixes easily	group oriented
promotes	energetic

area with the most circled characteristics represents that person's primary communication style, and the category with the second most number of circled descriptors is their secondary communication style.

Additionally, have others profile you so you can get a sense of what communication style others perceive you to have. It is equally important for clients to understand how you prefer to communicate to be able to foster an even deeper, mutually beneficial relationship.

DEVELOP A SPECIFIC PROJECT SCOPE

Try to avoid projects where the scope is *get me whatever you can*. This project is sure to fail or disappoint someone. A key action to effective project development is to get as detailed a definition of the questions as you can when defining questions. The last thing you want is to get all the information that is asked for and then have the client tell you, "This is OK, but it doesn't really help me solve my problem."

Of course not. How could it if the problem to be solved wasn't clearly and thoroughly defined at the beginning? Force the client to think about why the project is necessary. This is particularly important when working with a senior executive. Ask them:

- What decisions will be affected by possessing the information you seek? If none, then there is no point to conduct the project
- Will the results of this project, directly or indirectly, help save or make the company money or save the company time? If no, then there is no real value to the research
- What would happen if you didn't get the desired intelligence? If the reply is, "nothing, we'd proceed as planned," then the information requested must not be all that important.
- What do you need to know vs. what you would like to know?
- What is driving the current need for this project to be completed? If the answer is, "I don't know, I just know we need to know, then the client really doesn't know and you should tell them that the intention of the CI function is not to just answer questions for fun but to serve a purpose.
- Why are you requesting this project at this point in time? Why not two months ago or why not wait two months from now?

Like in golf, you must see the shot to make the shot. I have to know where the pin is on the green to know what kind of approach shot to hit, which tells me where I need to place my drive. Even if you see the shot it doesn't mean you can make it, but it sure increases your odds. Likewise,

intelligence gatherers must understand the objective (know the distance to the pin) so they can ensure the proper questions are being asked (or the right club selection is made).

Asking the above-mentioned questions ought to stimulate a client's thought process as to why they want to engage in the project. Posing these questions also allows the CI manager to take more of a consultative approach when interacting with clients, rather than just being an order taker.

DISCUSS PROJECT FEASIBILITY

Another important factor in managing expectations is to assess whether the project can even be completed. Not every question asked about the competition or industry can be answered. An end client must understand that not all that is asked for is readily available or even possible to obtain. If it were, the client would likely just get the data on his own.

Be honest. If you don't think you can get an answer, say so. This is particularly true when you are working with a senior executive. Although there might be some disappointment from the client when told that what is desired cannot be obtained, disappointment is better at the start of the project than at the end. However, you can significantly minimize the frustration a client might feel when told what they want cannot be gathered by immediately sharing with the client what alternate and equally valuable data can be acquired.

Bottom line: Don't promise more than you can deliver.

SET REALISTIC DEADLINES

It's also very important to agree on realistic time frames for completing a project. Since CI is heavily dependent on time and *human source* availability, the user and the practitioner's goal should be one and the same: setting deadlines to get the best possible information and still maintain a high degree of value.

Talk about the fact that most, if not all, of the desired information is not sitting out there on the internet. This is an education issue that should be ongoing. You have to tap into primary, human resources. Key experts have travel schedules, meetings, vacations, and other factors that may not make them available on your project's timeline.

For example, parts of Europe take long holidays. There are specific times of the year when it can literally take 4-6 weeks for sources to return a call. If you as a client ask for

work to be done in three days and the CI group states that it needs five days, give it the two extra days. CI managers, explain to your clients that if they must have the information in three days, then they have to understand that by not giving the time the BI team says it needs, they are basically minimizing tasks that need to be done. The net result is a lesser then optimum quality report.

Educate the client that having three days to complete an assignment does not translate into having three full days to conduct research. A given timeline must include time for the research team to strategize, conduct any secondary research, engage in primary research, analyze the findings, write the report, and identify the implications and next steps.

CI managers, don't bite off more than you can chew. If you start to notice your CI group is taking in more work than it can deliver while maintaining a quality level, first of all recognize this is a good thing. Second, get outside help. Third, delay start dates, and extend deadlines. It's better to be open with clients that your group is currently swamped or over capacity (which is hopefully perceived positively as it means you do good work), then take something on and not deliver.

If you compare your CI team to that of a manufacturing line, you should be able to get the point across. A manufacturing line running 24/7 can only produce X number of widgets. When it is operating at or near 100% of capacity, you can't magically start producing more in a set timeframe and still hit quality standards and already scheduled deadlines. To avoid having to take shortcuts in your research process flow or compromise quality, ensure there is a realistic deadline for completion.

SEEK PERSPECTIVE, NOT PRECISION

A key way to manage expectations is to seek perspective in answering a question, not precision. You can always gain perspective on any topic.

Ask your client: would you rather have 90% of questions answered based on an accurate perspective or 10% of absolutely precise information? Does it really significantly impact a decision to know that the annual sales of a privately held company are $102 million or $108 million? Isn't a report that states annual sales are between $100 million and $110 million sufficient to answer the question?

COMMUNICATE REGULARLY

Manage expectations by communicating regularly with your internal clients. People get edgy and nervous if they don't know the status of a project. That's human nature.
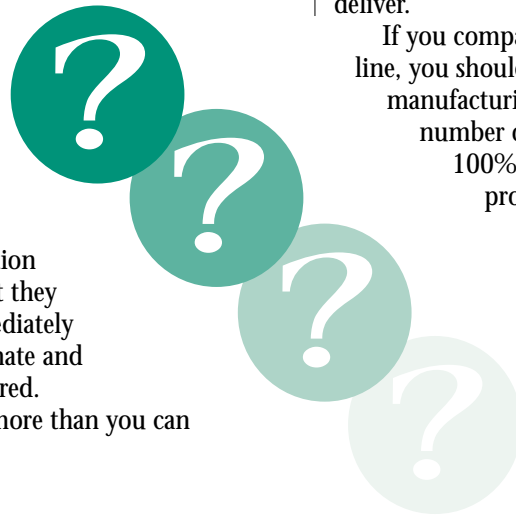
Don't ignore clients. Treat them as you want to be treated. Keep in contact with one another. Give updates. Share preliminary data noting that it is subject to change and the client ought not disseminate it to others yet.

If it looks like you are not going to be able to obtain certain data, that's okay, just let the client know early enough, not the day before the project is due. Communication throughout a project helps to set what to expect upon delivery of the final report based on the money invested, time allowed to complete the project, and the quality desired.

If during the course of the project the client wants to change the scope of the project from the original set of agreed upon questions (what we at Proactive Worldwide call *Research Creep*), then a formal process should be in place to handle these *change orders*. When a client says, "While you have your sources on the phone, can you also ask them about . . . ." Inform them that yes, you can do that.But along with any changes, the client should be made aware that the fees and timing could be affected depending on what exactly is modified in the project scope. A change in scope may not always result in a change in fees and timing for the final report. This is usually open for discussion, but dialogue between the client and the CI manager is a must.

So you now accept that regular communication is important. What's next? Do you just pick up the phone and set up a meeting? Unless you are an extraordinary communicator, this is often doomed to fail and you'll probably become discouraged about the entire concept of increasing communication with your client. All of a sudden the thing that was supposed to make your life easier will become a totally exasperating experience.

Fear not. I suggest that you communicate with clients, especially those that are new to you, first in writing. Send a brief email as it is easy, professional, and will pave the way for a phone call. The recipient of your letter will be more receptive if she has a clear understanding about why you are getting in touch with her. Have a clear agenda established . . . don't just wing it. Finally, try concluding the conversation with an action step such as "I'll call you with another update next Tuesday," or "Please send me in the next two days those file we discussed." Regular communication is the key to the whole process of managing expectations.

GOOD, FAST, CHEAP

Finally, what most drives a decision to proceed or not proceed with a project? Is it timing, money, or quality of work? It can vary on any project, right?

The bottom line is that good, fast information isn't cheap. Fast, cheap information is rarely good. When time is truly driving a project, the goal is usually met at the expense of one of the other two factors. Immediate or emergency requests can be confidently provided if the client understands that the information gathered might not be as complete as it could be if additional time was available.

You do have the power of choice to say no to taking on a project. I know it's hard to tell a CEO, "Sorry, can't help you." In fact, you should never utter those words. But you have to do a reality check and make it clear what kind of quality can be provided in what time frame and at what cost. Perhaps you can take on the CEO's project, but it might need to come at the cost of another project being delayed. Ask the CEO which one of the other assignments that your team is working on should be tabled or dropped.

It is uncomfortable or intimidating for many CI managers to turn down a project request. But when clients request a project that you know will not match your value system, is a huge burden to you and your team, and the costs to your team outweigh the benefits, don't take on the project. Look long-term, not just short term.

It comes down to choice vs. chance. Increased pressures on the demands for quicker and more cost attractive solutions are partially to blame for users' failure to grasp the consequences of unrealistic expectations. Chaos management styles and pressure from superiors intensify the "need it now, need it cheap, need it right" mentality.

Business intelligence should always either save or make time or money. Any answer that doesn't contribute to meeting at least one of these goals is a waste of both. Expectations among all parties — corporate clients, internal BI coordinators, and BI consultants — must therefore be managed.

With expectations management, good things will happen. People will be calmer (reduced chaos) when everyone is on the same page. You will be perceived as highly professional and gain credibility and respect. The net result will be that your internal client will have a positive experience and provide more repeat work, which helps the overall viability of your position and the CI function.

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