

Understanding Client Cultures

Introduction

If your company provides a specialist service to other organisations - perhaps graphic or web design, financial or legal advice, management consultancy, or PR support - it is essential to pay attention to the dynamics operating in your client's organisation, otherwise you can find yourself in hot water.

On the other hand, by making sure you understand the client's organisational culture, and by imagining the world from your client's perspective, you can open doors to new opportunities for your business.

James Barrett of JB Consulting presents the issues, drawing on a pertinent case study of a graphic design firm that he has worked with.

Hanged, Drawn & Quartered

Josie Green is a senior partner with Bright Sparks - a small design company in Clerkenwell. Last October she was approached by a new client, the famous and charismatic George Rollins QC, senior partner in a law firm with a national profile for championing social justice. The firm wanted their corporate identity redesigned.

Josie had long admired the firm's social integrity, and leaped at the chance to work with Rollins. She invested additional time in developing her treatments for the firm, producing some of her best concepts to date, which she eagerly presented to George. He seemed pleased but noncommittal, and agreed to get back to her with his final choice of design.

Months passed and she heard nothing, though she regularly saw Rollins on TV news programmes defending a difficult refugee test-case which was generating a lot of public hostility. Each time he appeared on TV Josie was prompted to call his office, but silence prevailed.

Then, a week before Christmas, Rollins's PA called to schedule a meeting for the following evening. It was Josie's last day in the office before the New Year, but she eagerly jettisoned everything to be able to attend

the appointment. When she arrived she found herself in an austere boardroom facing Rollins' partner, Arthur Cloote. Rollins himself was unavailable.

Cloote produced Josie's treatments, heavily worked-over in red pen. He hectored her for "slovenly and illogical" work, cross-examined her on her every design decision, then ushered her out, with the parting shot, "Now do me some honest work by the end of the week!" She spent the next few nights in her office feeling imprisoned, guiltily trying to compensate for her "wrongdoing". Her Christmas break was in ruins; she felt confused, devastated ...

Making Sense Of A Nightmare

The Designer-Client Dynamics

It might have been easy for Josie just to dismiss Cloote as a sadist, to drop the firm as a client, and to walk away with a modicum of dignity. But she knew there was something more complicated going on in the dynamics between herself and the law firm that might be repeated in her dealings with other clients.

What confused Josie was that she had accepted Cloote's inference that she had committed a heinous crime and had rushed to make amends. As someone who worked with visual symbols and who was also engaged with social causes, she was well attuned to the traditional trappings of power that littered the firm, and she thought she would be immune to them. But in her excitement about the design brief, her rush to show her admiration for Rollins, and her anxiety about his not returning her calls, she did not retain her sense of professional authority. This derailed her from following the standard protocol that Bright Sparks used for briefing and following up clients.

She was sufficiently concerned by her experience that she scheduled some structured developmental sessions with me, for herself and her colleagues. During our first group meeting she had a sudden angry outburst:

"Lawyers! They just spend their lives editing documents, wielding red pens and imposing a pedantic logic on people's lives!"

Everyone was startled by the strength of her passion, and embarrassed by her crude stereotyping of the legal profession. But it provided a powerful springboard from which Josie and her colleagues could explore the culture of legal firms, and could then envisage the ways in which the legal profession might lampoon graphic designers.

Josie realised that lawyers traditionally find security in technical precision. She was aware that she had not presented her treatments for the firm's ID as coherently and systematically as she might have, so that the "arty nonsense" of creative design processes must have seemed utterly alien and intangible to Rollins & Cloote. No surprise then that Cloote had tried to retreat to more familiar turf by treating the designs as he would a legal document, and imposing his authority on them in red ink.

The Client Dynamics

There are further complicating factors in the legal practice which would have amplified the confusion. Josie hadn't thought to make her usual enquiries about lines of decision making at the firm, simply assuming that someone as famous as Rollins must be in command, and investing all of her energy in her professional relationship with him.

With the support of her colleagues she decided to persevere with the legal firm, and established that in fact Rollins & Cloote operated a traditional legal structure: two equal partners with insufficient role differentiation between them. They expected to resolve any conflict by "gentlemen's agreement" as and when it arose, but they had no mechanisms for dealing with decisions about corporate ID.

There was something else at stake which we can only guess at, based on experiences of trauma in other organisations. Legal professionals are trained to engage with the world from a detached, rational perspective, which provides limited protection from the emotional impact of distressing cases that arise in criminal and social law. The refugees represented by Rollins & Cloote in the difficult test case were fleeing the carnage of civil war and now faced hostility from a misunderstanding public. It is likely that Cloote was distressed at the way his clients had been brutalised, and was unconsciously taking his frustration out on Josie in the most familiar way available to someone

in his profession: he played bad cop to Rollins' good cop, acted as judge and jury, and delivered a crushing "guilty" verdict.

Avoiding Pitfalls

Josie's experience is a particularly severe example of the messy dynamics that exist in client organisations, and in consultant-client relationships. If your company provides some form of specialist advisory service you can't prevent this syndrome from occurring in your client organisations, but you can reduce the damage it can cause to your relationships with your clients by anticipating it, by not being drawn into it, and by ensuring full systems are in place to support you and your staff.

At the same time, it is important not to pathologise your clients, and instead to take advantage of the positive opportunities which arise from being able to read the culture of your client organisations accurately. Josie learned from her traumatic experience, and she and her colleagues have since become quite adept at sussing out the organisational culture of prospective clients. Her subsequent experience bears this out.

The Cat's Whiskers

One of Josie's recent clients was Archers, a market research organisation eager to build its European profile.

Her first meeting with the Archers representative was lacklustre. Brian Nicholson was a middle manager and, in Josie's rather brutal initial assessment, was "a first-class anorak". He made it clear that responsibility for project managing the European campaign had been dumped on him and he had no interest in it whatsoever.

Their meeting grew increasingly dreary as he nit-picked over trivial details, demanding evidence for each aspect of the design protocol, and insisting that all Archers required was a 2-colour leaflet - hardly the material of Euro-credibility! By the end of the meeting Josie felt catatonic, and decided not to take up the contract.

She was on the verge of leaving Brian's office when it occurred to her that the one point in their conversation when Brian had been animated was when he had discussed his recent market research findings. She paused to ask him:

"If this design were a market research exercise, how would you do it?"

Brian was suddenly galvanised:

"You'd need a research question or hypothesis, a statistically valid sample of people who could answer your queries. You'd use preliminary findings to present people with more specific choices. It's like testing the latest cat food..."

She winced to hear her designs reduced to cat food, but consoled herself that she had broken through to him at last.

They met the following day to map out a research brief for the campaign. There was to be a short questionnaire circulated to company staff, asking what image the company should be projecting in mainland Europe, and asking what members of the public most valued about the company.

A fortnight later Brian and Josie read through a pile of enthusiastic responses from staff. "It's a statistically relevant sample" Brian pronounced proudly before they hammered out a joint report to present to senior management. The report struck a chord: Archers invested in a decent promotional campaign to pursue new European clients, and Bright Sparks was appointed to provide ongoing design consultancy to the company.

Understanding Archers

Josie managed to restrain her initial hostility to Brian, recognising that her branding him as an "anorak" allowed her to opt out of understanding the organisational culture at Archers. Once she recognised her own defences against the market research company it was easier to contemplate the company's defences against her graphic design.

Josie discovered by observing Brian that researchers are driven by a need to critically analyse data, and are cautious not to proceed without empirical evidence for their decisions. She presumed that Archers' senior managers had found it difficult to get to grips with the fundamentals of something as abstract as design and had therefore abdicated their authority. They passed the buck for a crucial dimension of their European

expansion onto Brian, their "geeky" middle manager. They may even have expected him to mess up, and so reinforce both their low regard for him and their contempt for "arty" design.

In the circumstances Josie had to make an intervention which would allow Brian to cover his back, and which would also give her legitimate access to the organisation's key decision makers. In the first instance Brian had to be convinced of the validity of the design programme, on his own terms.

But there is more to it than intellectual reasoning: Josie had become catatonic in the meeting because Brian's damp-squib approach had quelled her own passion for graphic design. She had to locate a corresponding spark of passion in Brian which would arouse his interest in the project and enable him to recognise the buzz that designing gave her.

What Your Agency Can Do

Anticipate The Culture

As a designer approaching a new client, it is worth considering what the client's organisation might be like, so that you can minimise the harmful aspects and really make the most of the organisation's strengths.

- How might your client's behaviour mirror what the organisation does professionally?
- How might your client's staff act out the stuff which happens with their customers?

In preparing for the worst, it is useful to know that messy dynamics will be stronger in situations of greater distress or confusion, such as:

- "Stiff-upper-lip" or highly rational organisations that don't deal with the emotional impact of their work.
- Organisations helping clients who have had abusive experiences.
- Organisations where lines of authority are unclear or where authority has been abdicated.
- Situations where clients feel threatened or out of their depth. (In this example they were unfamiliar with graphic design methods.)

More importantly though, you need to consider how best to inspire your clients to appreciate the exciting benefits that your particular company can offer them:

- What framework will allow the clients to translate the intangibles of your work into something more credible within their way of thinking?
- What are the issues likely to arouse your client's passions which will help them understand your passion for your work?

Anticipate Your Reaction

Your response to the client will influence how the designer-client dynamics are played out. If you can hold your professional authority you are more likely to contain the messiness of a client's organisation. At best your professional and skilled intervention could cement the foundations of a long-standing, lucrative account. At worst it could minimise client hostility and allow you to exit relatively unscathed.

When preparing to meet new clients, consider:

- What reactions they might trigger in you?
- How you can avoid unintentionally provoking a strong negative reaction from the client?
- How will you keep feelings of hostility towards the client in check? (And how will you "dump" those difficult feelings later?)

Monitor Your Response

Pay attention to your gut reactions to the client, and keep these in check. Sensations can get very entangled. For example, if you are feeling hostile towards the client this could be your unique feeling, but it could also be that you are unconsciously responding to hostility from the client and assuming that this hostility is your own.

Recognise that hostile feelings may be symptomatic of you and your client having a very different outlook on life. If the interaction is going badly, pause to think about how you can make the process of your work credible within the values of the client culture.

Bear in mind that your extreme feelings – good or bad - can block your balanced perception of the client. If you are feeling severe hostility, what is it about the client that you are failing to engage with? If you are putting the client up on a pedestal, what are the warning signs about the client that you could be ignoring?

Your Agency's Systems

The best way of minimising difficult client relations is to agree clear terms of engagement at the start of a contract, and to return to these first principles when clients appear to be losing their way. As a bottom-line, it is essential to have clear systems in place, and to be explicit with client about the schedule, fee structures and timescales of your work.

On top of this, successful agencies with whom I have worked have made it a priority to learn to read their client organisations' cultures, and to use this information to foster good client relations. Their strategies have included:

- Always attending meetings with new clients in pairs. One person leads on maintaining the dynamics of the meeting and the other leads on the business element.
- Routinely having debriefing sessions after client meetings.
- Running regular staff development sessions focusing on client relations, using recent assignments as case studies.
- Employing account handlers who understand the psychology of client relations.
- Making use of external support, such as regular coaching with a consultant, especially on large, complex or difficult projects.

It is up to you to decide on the best strategy for your organisation, appropriate to your structure, available resources and scale of operation. What is clear is that resources invested now in getting your organisational systems and client relationships right more than pay for themselves by preventing expensive misunderstandings later.

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