ANTHROPOLOGY CAREER READINESS NETWORK

Client Engagement Best Practices

Working successfully with a client is based on factors such as appropriate expertise, adeptness in relationship building, identifying and responding to client interests and concerns, and quality and timeliness in the delivery of a product (e.g., research, program, process). A client is someone for whom you provide the needed services (e.g., research, advising, evaluation, program design) to assist with a problem, usually for a fee. A class project may also be designed around the client's problem.

Client Engagement Phases

This tool introduces a model of the key phases of client engagement. It offers advice on interacting with clients whether you are supervising a client-based class project, launching your own consulting practice, seeking new clients as a seasoned consultant, or working with senior leadership in your own organization. While all phases of the work matter, significant energy is required during the proposal stage to ensure you and the client share a common understanding of what the work will entail.

Phase 1: Discovery and Connection

How do I find a potential client?

Use the resources close at hand—including your own network among colleagues and friends—to expand your connections. (See the ACRN tool Making Connections with Local Organizations.)

- Enlist members of your network to offer you an entrée to organizations where they have relationships.
- Collaborate on a project with someone who already has an organizational client.

As you meet these new contacts, conduct informational interviews with them to learn about their organizations and the issues they face.

Other options to consider:

- Attend networking events, including local ones, to spread the word that you offer consulting services.
- Consider trade magazines and trade organizations to identify contacts.
- LinkedIn and other social media platforms may be a source of events and connections.
- Plan to attend area conferences, including those beyond anthropology.
- Respond to Requests for Proposals (RFPs) from local, state, or national organizations and government agencies.

Do not fear the cold call (i.e., calling an organization that does not know you) but do not rely on the cold call alone.

An essential part of networking involves marketing your services. Use these aids to assist:

- Create business cards and brochures of your services.
- Launch a website.
- Advertise on social media and in local news outlets.

Phase 2: Relationship Building

How do I establish a relationship with a client?

The phone and the internet are fine first steps, but there is power in meeting. A virtual or face-to-face meeting with a prospective client signals your interest in and commitment to a future relationship. If in person, try for a coffee or lunch meeting. The ritual of sharing a cup of coffee or a meal will allow you to learn about each other.

Luck favors the well prepared. Prepare for a first meeting by:

- Researching the organization
- Learning about the person you will meet.

Develop some opening thought-starter questions, such as:

- What are your primary responsibilities?
- How long have you been in that role?

What is keeping this client "awake at night?"

Strive to learn as much as you can about the client in your initial conversations—whether by phone, online, or in person. Clients always face an array of problems. Ultimately, you want to identify the nature of their work issue, organizational concern, or business predicament. If not intrusive when you meet in person, have a notebook handy to jot down key terms or insights. The notebook may also contain questions that you (or your team or students) have about the client and the organization.

Think of your first meeting as an initial semi-structured ethnographic interview. That's a skill you already have! You may wish to offer some suggestions on anthropological approaches to their concerns, thereby beginning to help your client from the "get-go," giving the client the sense that your first visit was time well-spent.

Avoid any discussion about politics or religion unless it is relevant to the client and their mission. After you have a contract and trust is built up, you can share personal concerns of common interest selectively.

Phase 3: Proposal and Negotiation

What do you cover in a proposal?

Let's say that the client is interested in having you work on a project. In most cases, they will ask you for a project proposal or Statement of Work (SOW). At a minimum, this document includes:

- Your approach to the client's problem
- How you plan to do the work
- Who will be involved

- When you expect the project to be completed
- How much the project will cost.

When the work is pro bono, you may not be asked for a formal proposal. However, it can be useful to develop a written proposal to ensure that you and the client are aligned on the stated problem and the work involved.

Have prior organizational actions been successful?

It is always helpful to have access to background material on the issue the client has raised:

- Has any prior research been done by or for the client?
- Are there organizational documents that might offer additional information?

Prior work (e.g., consultant report, employee turnover statistics) may prove fruitful in illuminating aspects of the context as well as the specific issue. If the client offers you any documentation, you are likely to be asked to sign a non-disclosure agreement (NDA).

What is the project deliverable?

Will you deliver a slide deck, video, other digital media, or a prose report? If done appropriately, a slide deck is often the preferred format for sharing your results—(i.e., "deliverable"). Think of a Canva or PowerPoint slide deck as a handout that is designed to capture salient features of your work simply and concisely. When done well, someone who did not attend the presentation can absorb the vital insights and recommendations from your slide deck. Make sure you and your client are in agreement on how many times you or your team will make a final presentation.

Prose reports offer greater detail than a slide deck but they generally do not work well with clients who want to understand what you have learned quickly and effectively. If a narrative report is one of your deliverables, include an "Executive Summary" at the beginning. It may be the only part of your report that is widely read. Ultimately, the form of your deliverable will depend on your client's need to garner buy-in for your project's findings and recommendations.

Video and audio present both technical and communication challenges. Video involves time and costs to collect and edit. If you use video or audio, introduce your insights first. You want to avoid a situation in which the client focuses on extraneous details (e.g., participant's dress, accent, skin color) rather than what you intend for them to learn.

Is your client clear about your project plans and your ethical responsibilities?

Discuss and then document your approach and the nature, timing, and cost of your project's planned deliverables in the written agreement. This agreement should specify who owns the results, data, and the insights as well as specify your plans to maintain confidentiality and informed consent. It should be signed by you and the client. Large organizations may have their own contractual documents which require your signature.

Generally, "raw" data (e.g., interview transcripts, participant observation notes) are retained by the researcher. If your client wants access to this data, agree on how it may be used while still protecting confidentiality. Similarly, if you hope to present or publish non-proprietary findings, make clear that you will maintain organizational confidentiality unless your client prefers otherwise.

How will you handle course-corrections?
In exploratory research projects, early patterns may suggest the addition of new questions. Discussing the possibility of course-corrections will help avoid surprises. Your research plan should build in adequate time to reschedule or add interviews, or to include newly discovered contexts related to the problem being investigated.

Beware of "scope creep" in which the client seeks to append a new research direction to the original scope. The impact of this kind of redirection will compromise your time and budget. You may indicate that those new avenues for investigation are doable, but should occur in a Phase 2 of the project.

Do you know your cost and time commitment?
Your written project plan should be developed with a clear sense of your team's time and costs. In the case of a client-based class project, the course end-date dictates when the work must be concluded. Timeframes for other projects vary based on complexity, budget allocation, and other factors.

Figure the costs in staff time, equipment, and other expenses for each project step. Include your overhead such as fixed costs (e.g., internet, office), taxes, and a margin for profit. Pricing your work can be challenging. Consult with colleagues to find current practices regarding pricing within your field of practice.

At some point, you will need to discuss, and possibly negotiate, your project cost with your client. While recognizing the resources you will need to complete the project, acknowledge that your client likely faces constraints as well. Price reductions to meet client constraints should be reflected in reducing the project's scope or sample size to reach agreement on the budget.

Have you discussed how to manage travel?
Some anthropologists include travel as a lump sum component of their overall cost rather than providing unnecessary detail. Others submit receipts for travel directly to the client, separate from the proposal. State and federal guidelines online will help you estimate per-diem, travel, and lodging costs. Experienced consultants do not skimp on lodging and meals, given that fieldwork and travel require well-rested researchers. Some clients, especially government clients, may have their own travel reimbursement requirements to which you will have to respond and provide adequate documentation, such as itemized receipts.

Have you discussed payment processes?
For student projects, suggest that your client cover any student expenses (e.g., government rate for mileage) and/or expenses for participant incentives (e.g., gift cards).

Negotiate an up-front charge, often up to half the project cost, with the balance paid upon project completion. For many clients, interim and final payments occur at least 60 days after submission. However, learn your client's payment process. Some clients prefer invoicing and payment on a monthly basis which ensures that they are satisfied and you are paid for work provided.

Phase 4: Project and Client Management

Do you track your project's phases?

Creating a Gantt chart will enable you to follow the project's progress. This horizontal timeline portrays project phases arranged sequentially with weeks or days at the top of the chart, along with an indication of team members responsible for these phases. Providing an abbreviated chart in the proposal helps the client visualize your process.

As the project begins, set aside time for discussion with the client and their key stakeholders to get a broad understanding of the organizational context and some initial perspectives on the client's issue. Later, when interviews and other ethnographic methods are involved, it can be challenging to complete them in a timely way due to "busy" calendars. If you are doing organizational work, ask for the client's assistance in sending out an email to:

- Notify employees that the project is underway
- Seek their cooperation in responding to requests quickly.

Be sure to discuss the necessity of time needed for analysis. Many clients assume that once the data is collected, the project is about to wrap up. A good rule of thumb for you: one hour of data collection yields about five hours of analysis and presentation development.

Review your progress and inform the client of any roadblocks or changes to your timeframe. Track your budget against your Gantt chart.

When will you provide feedback on what you are learning?

Clients are eager to know the status of the project.

- Informal conversations offer an opportunity to provide some details.
- Formal updates, complete with preliminary slide decks, enhance the client relationship and offer assurance that the work is progressing.

Common project milestones often occur at the project's midpoint, or quarterly in the case of long projects. These updates should include early insights as well as planned actions for the next phase. They also provide a time set aside when both parties can focus on what is being learned, ask pertinent questions, and align perspectives. Dialog helps build and extend the relationship and will improve the reception of your final deliverable.

Will your client join you in fieldwork?

While not always part of a project, client participation in fieldwork can offer benefits:

- The client may come to understand the value of ethnographic work.
- They may enjoy the process enough to become a repeat client.
- They may come to a more intimate and actionable understanding of the problem at hand.

However, client participation must be managed carefully. Clients must be cautioned not to jump to unwarranted conclusions based on their partial participation in the work.

For student projects, a client may participate in several important ways:

- Spending time helping students understand the organization
- Offering further detail about the potential sources of the problem being investigated
- Reviewing pertinent policies and regulations.

In organizational work, clients would not be involved in interviews with organizational members for a number of reasons, including interviewee confidentiality. Prior discussion and setting clear expectations regarding client participation is key to working with clients in the field.

Phase 5: Project Delivery and Follow Up

Will your final report convey your work in a convincing and actionable way?

At least four strategies can help you address this question:

- Be responsive to client review/approval structures as you prepare to finalize your work.
- Share one or two insights with a few of your most interested and knowledgeable participants to gauge their reactions.
- Hold a preliminary review with a small client group to explain the key discoveries and gather perspectives on your proposed recommendations.
- Confirm attendees at the final presentation and ask about their expectations.

Do you know if the client found the work helpful?

A simple post-presentation evaluation, often done verbally, can offer important feedback. A few questions are sufficient, such as:

- How satisfied were you with this presentation?
- What would you have liked to hear less about?
- What would you have liked to learn more about?

Sometimes, clients may use your work to make organizational, marketing, or policy changes. Check with them sometime after the project has ended to find out whether any changes were implemented. You may discover they have taken actions that were helpful to the organization. Since organizations are unlikely to broadcast the impact of your work, find out! It may help you gain future clients.

Will others find your work helpful?

At the end of the project, ask the client if there might be other venues through which you might present non-proprietary aspects of your efforts. If possible, collect written recommendations to use in your marketing for future clients. Be ready to share your general, non-proprietary and methodological insights with others in your client's work sector, and with students, too.