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1. How should you handle this client who appears to be angry or frustrated?

The Business Consultant should listen carefully to what the Client is saying. Observe any non-verbal signs to help understand the source of the Client's frustration. If the source of the frustration can be dealt with within the definition of services provided by the CSBDC, then the Business Consultant should attempt to help the Client. During the course of the meeting the Business Consultant and the Client should come to an agreement on expectations regarding how the CBC and The CSBDC can help the Client and areas where the Client may have to be referred to another organization. By the end of the meeting, the Client and CBC should have built a resolution and follow-up actions agreed on.

2. How should you handle the fact that the client seems to have unrealistic expectations for his business?

It is probably too early to address the market potential for this business. By gaining the trust of the Client, the Business Consultant can set expectations and demonstrate how they will work together to develop the business plan and market forecast. Asking effective questions about how much research the Client has done may help him understand that additional work is needed to determine the market potential for the product.

3. The client is unable to clearly explain his business idea. How can you help him to do so?

The Business Consultant should show patience in letting the Client thoroughly explain his/her business idea, paraphrasing, "Let me see if I understand what you have just said," to make sure the Business Consultant has a full understanding of the product.

4. The client has resisted your recommendations. How should you handle that?

The Business Consultant should anticipate resistance. In this instance the Client probably needs to understand that the benefits of personally writing a business plan far outweigh having someone else do it for him/her. The Business Consultant should encourage the Client ("you can do it") and offer assistance ("we're in this with you").

1. "But can't you just tell me what I'm supposed to do? You're the expert."

Consultant: "It's true that I'm here because I have some skills and experience that might be helpful to you. But I'm not as knowledgeable as you are about the details and background of your situation, let alone your own motivations and feelings. And, when you come to implement an idea, I'm not going to be around to make it work for you. After listening to you, I'm convinced that you have the ability and wisdom to solve this problem. I'm happy to work with you in clarifying it and exploring what might work for you. But,

ultimately, you are the one who must be in charge of your life and your problem-solving."

Alternative Response: "But you're the expert on your own situation. Let's talk together on what you might do."

2. "Tell me about your background. Have you ever consulted on cases like this one before? Have you ever run a business yourself - or did you just get this stuff out of a book?"

Consultant: "Yes, I'll be glad to tell you about myself. I have seven years of business experience, including three years managing my own small consulting firm. I have to meet a regular payroll, supervise employees, and collaborate with partners. I have an MBA degree and teach organizational development for the SBDC. While each case is unique, your case raises issues that are similar to many that I've met before."

"I've learned a lot from books, as well as from lecturers and consultants, but I believe there's no substitute for hands-on experience. I enjoy using my experience, knowledge, and training to think about business problems in general and help individuals like yourself, who bring their special and unique problems to me."

Alternative Response: "I'm getting the sense that you don't think I'll be able to be helpful to you."

3. The client looks out the window and doesn't appear to be listening.

Consultant: "Are you with me so far?"

Client: "Yeah."

Consultant: "Perhaps you could let me know what you've heard me say about this issue so far? I often find it helpful to stop periodically in a session like this and take stock of where we are. One of the best ways to do this is to have the client summarize what she thinks the consultant is saying." (Then wait in silence for the client's response.)

Alternative Response: "I'm getting the feeling that you don't really want to be here."

Alternative Response: "It's difficult to try to deal with these problems, isn't it?"

Alternative Response: "What would be most helpful to you at this point?"

4. "Well, you've give us a lot of good ideas but we don't have the time to implement them."

Consultant: "I can understand your concern about the lack of time to implement good ideas. You're right to be aware that time is a vital factor to consider if you want an innovation to be successful. If you think an idea is good, it seems that there is something in it that might help you. Try to analyze the idea and see if there is a small piece of it that you could implement in the near future. Take this small piece, set up a plan and timetable for implementation, and try it out. If it works for you, try another piece."

Alternative Response: "It sounds as if you're rather overworked. You've been so pressed you haven't had time to put the ideas we discussed into action." (Then wait for client's response.)

5. "I think looking at the balance sheet would be a waste of time. I don't think it really could tel us anything anyway." (The consultant suspects that the client may not know what a balance sheet actually is.)

Consultant: "My reason for suggesting that we look at your balance sheet is that the bottom line has a way of rising up and hitting you if you don't pay attention to it. I'd be glad to look at your financial situation today or at a later session. Or, you might want to hire someone to come in and give you a reading on your firm's financial health. It's like getting a physical check-up. It's nice to know you're in good health. It's also to your advantage to know if there are any signs of impending trouble." (This does not confront or corner the client, but let's him know there may be a cause for concern.)

Alternative Response: "You don't think looking at the balance sheet would be helpful. The reason I suggested doing so was that I thought it might give us some useful information. And if you agree, I'd like to talk to you about how to use a balance sheet to your advantage."

6. When the client didn't show up for an appointment, the consultant called to see what happened. The client replies, "Oh, I don't know why I scheduled it for Monday. Mondays are always bad for me."

Consultant: "I'll be glad to schedule a new appointment for you at a time that would be convenient. How about next Tuesday at five p.m.? It's helpful for me if clients who must cancel or reschedule an appointment call this office in advance because the time slot is held for them. On Monday, for example, I held that time for you, although another client had requested it, because you and I had agreed on that hour and day. I'll look forward to seeing you on Tuesday at five p.m. If you find you cannot make that appointment please call this office as soon as possible. Thank you."

Alternative Response: "Let's plan more carefully next time so that we schedule our meeting at a time when you really want and are able to come."

Alternative Response: "Did someone suggest that you seek me out or was this your own idea?"

7. A client seems enthusiastic during the meeting, but when you call a month later, she says she has not followed through on any of the suggestions.

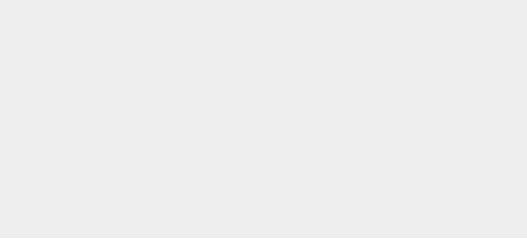
Consultant: "How do you feel about that?" (If she says, "Fine.") "I wish you good fortune in your future activities. Call us again if we can be of help."

(If she says, "Badly.") "Is there anything in particular you would like to have followed through with by this time?"

(If she identifies some change.) "Can you think of a strategy to start the change - or a part of it? I suggest that you set a timetable for the implementation. Would it be helpful for you to schedule another session with me or another consultant to renew your examination of the situation?"

8. When you talk to a prospective client on the phone, you can tell that he really needs help. How do you convince him to come in?

Consultant: "I believe your problem is manageable, that improvements can definitely be made in your situation. In my experience, clients find much help by sitting down and exploring their problems with a sympathetic listener. I'd be glad to listen. Nothing will be demanded of you other than a willingness to share your questions, needs, or problems with me. I have confidence in your ability to solve your own problems, with appropriate help and feedback."



Alternative Response: "The issues you've mentioned are ones I've worked on quite a lot. I think that between us we might come up with some strategies that would make your work situation more manageable. Is there some time next week when you might come in?"