

What Women Clients Want

STAT8801
Statistical Consulting

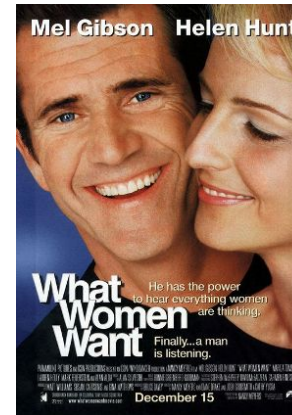
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The Plan

- What makes a satisfied client?
- Aligning consultant and client goals.

Hollywood



In the film *What Women Want*, Mel Gibson's character becomes able to hear the thoughts of women.

He uses this to advance his advertising career.

We cannot read clients' minds, but we must know their needs and preferences.

This makes us better consultants.

This lecture mostly follows Chapter 2 of Derr (2000).

Teams

Another interesting feature is teamwork. More and more, in government, industry, and elsewhere, work is done on teams, not individually.

Phil Ross (1995):

The most important thing I would like to see is people emerging from graduate school understanding that they are going to play on a team, and knowing how to communicate in that team setting. That is very difficult for people, especially those majoring in mathematics and statistics.

Plays Well With Others

We each have

- different personalities,
- different ways of learning,
- different knowledge bases.

True for both consultant and client.

For relationship to work, must meet in middle and build bridges¹.

¹Sounds like a marriage counselor!

Happy Clients

What makes a happy client? [handout]

- Accommodating.
- Professional.
- Accessible.
- Easy to understand.
- Writes clearly.
- Enthusiastic.
- Communicates well.
- Addresses client's problem.
- Concerned.
- Good attitude.

Stop me when we get to the part where the client praises the consultant's use of measure theory and second-order asymptotics.

Making Happy Clients

- Learn about the problem, and its context.
- Learn what the client understands about the problem.
- Fit the solution to the client AND to the problem, not just the problem.
- Empower the client to solve his/her own problems.

Unhappy Clients

What makes an unhappy client? [handout]

- Incomplete explanation.
- Unfinished business.
- Delay.
- Late.
- Irresponsible.
- Non-responsive.
- Poor communication.
- Incorrect.
- Slow.
- Client attitude
- Client expectations
- Unrealistic goals

Quality for Customer Satisfaction

- Availability: can the client contact the consultant.
- Responsiveness: does the consultant react promptly to client.
- Timeliness: is the job accomplished within the customer's stated time frame (or negotiated time frame).
- Completeness: is the job done.
- Pleasantness: did the consultant have professional behavior and manners.

Where's technical accuracy?

What's coming up?

Dealing with clients:

- Making the client comfortable: non-verbal communication, setup of the space
- Asking good questions: getting the client to talk to you about the statistical and scientific aspects of
- Setting Expectations
- Handling conflict

Reporting Results:

- Writing
- Tables
- Graphics

Aligning Expectations

Consulting relationships work better when everything is spelled out.

So what do we need to set up?

Issue 1: What is your role?

- What are your responsibilities?
- What is your level of authority?
- How do you participate in decisions?

Trouble if lots of responsibility but not authority or decision making.

Issue 2: What are the roles of others?

- Who has responsibility and authority?
- Who makes the decisions?
- Or how are these divided among the team?

Issue 3: How will communication be maintained?

Who talks to whom?

Regular reports both directions.

Issue 4: What are the deliverables?

A deliverable is a “product” to deliver to the client, a data analysis, design, report, etc.

Deliverables should be relevant to client needs.

Deliverables must be feasible.

Issue 5: What are the deadlines?

What needs to be delivered when?

Are deadlines feasible?

Timeliness is a key to client satisfaction.

Issue 6: How are you compensated?

This needs to be decided right at the start!

Hourly rates ... any limits on hours? Fixed price agreement? Pro bono?

What about authorship?

Issue 7: What are acceptable statistical practices?

Any legal restrictions?

Standard practice?

Client requirements?

Software requirements?

Issue 8: Who has ownership rights?

Decide at the beginning who owns what. Get it in writing.

Issue 9: Security and confidentiality?

What needs to be protected?

How can you assure that it is protected? What procedures need to be in place?

Legal requirements?

Issue 10: When are you done?

You may want to finish.

Client may want you forever.

Establish circumstances under which your participation is done.

You can always make a new agreement to continue.

Summary

- We need to develop our skills (not just statistical skills) to be a good consultant.
- Most of client satisfaction is non-technical.
- Establish expectations to frame your role in a project.