

2.6 Aligning Expectations

Clear communication between you and your client will help you both feel satisfied with the outcome of your work together. When you and your client have different expectations about the arrangements you have made, either one or both of you may end up feeling dissatisfied. In order to prevent this dissatisfaction, what topics should you and your client discuss and agree upon? In statistical consulting, there are ten issues that represent special vulnerabilities in the client-consultant relationship. Lack of clarity about these topics is often at the root of misunderstandings, unmet expectations and dissatisfaction. Although you probably won't have to discuss all ten issues with each client, it is good to keep them all in mind when you are setting up a new consulting agreement. These ten issues are as follows:

Issue #1: What is your role?

Your role in a consulting project is defined by three components: (1) your responsibilities; (2) the level of authority that you have, and (3) the way that you participate in making decisions. This can vary a lot from project to project. You can become dissatisfied when this role has not been well defined. Another source of difficulty occurs when the three components of your role

do not correspond well with each other; for example when you carry a great deal of responsibility but do not have much authority or much access to the decision-makers.

Issue #2: What are the roles of others on the project?

Closely tied to your role is the part that others will play in the project. It is important to find out the division of responsibilities and authority in a project and what the decision-making process is. As with Issue #1, problems arise when these are not well defined or when they do not correspond sensibly with each other.

Issue #3: How will communications be maintained?

Projects are dynamic, and when you stay in regular communication with your clients you are most likely to keep abreast of the changes. This will enable you to expend your efforts in the most efficient way. Many different kinds of problems can arise when communications are inadequate among the members of a project team.

Issue #4: What are the "deliverables"?

Let us define "deliverable" in the most general possible sense to mean whatever you have agreed to provide for the client or the project team. If you spend a lot of time and expertise in producing deliverables that the client does not perceive of as relevant, then neither you nor the client is likely to be very satisfied.

Issue #5: What are the deadlines?

Timeliness is a key dimension of customer satisfaction. Sometimes a deliverable that is one day late has no value. You should know what a project's deadlines are and how flexible they are, so that you can evaluate whether or not you can meet them.

Issue #6: How will you be compensated for your participation?

Let us also define "compensation" in the most general possible sense to mean whatever the client has agreed to provide to you in exchange for your work. Dissatisfaction can arise when you and your client have different interpretations of how you will be compensated for your efforts.

Issue #7: What are acceptable statistical practices?

You and your client or project team should be clear about what statistical practices are acceptable for a project. Problems can arise if these agreements are not made in advance of summarizing and analyzing data from a project.

Issue #8: What are the ownership rights?

It is natural for you to feel a sense of ownership of a project after spending a lot of time and brainpower on it. However, it is a really good idea to establish with your client the circumstances under which you may make future use of information from the project or make this information known to others.

Issue #9: What stipulations are there for security and confidentiality?

You are responsible for maintaining the security and confidentiality of the information that you have received from your client. You should make sure that you and your client both understand what the expectations are and what the capabilities and limitations are of your workplace.

Issue #10: When is your participation finished?

Sometimes it seems as if a project is never finished! You may want to close off your participation in a project and direct your efforts to other activities. The client may want to continue to explore the data or extend the project into other promising directions. These two different perspectives can lead to dissatisfaction at the end and may overshadow your earlier good work. For this reason it is a good idea to agree on the circumstances under which your participation in a project has finished. At that point you can have the option to continue under a new agreement.

There seem to be a lot of vulnerabilities in the client-consultant interaction where dissatisfaction can arise! This is part of the challenge of statistical consulting. The rewards are just as great or even greater when you and your client establish a satisfying working relationship. You and your project team will also feel this satisfaction when you work together to develop a technically sound solution to a problem. Many of the potential sources of dissatisfaction discussed in this chapter can be avoided by timely and clear communication. Once you and your client are aligned on your expectations, you can focus your energies on providing your high quality statistical efforts towards a satisfactory outcome.