

Starting From The Client's Point Of View

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ABSTRACT

This purpose of this paper is to look at how you can work your way from a client's current point of view to helping them see things from a new point of view. It's a step by step process, not a leap.

1. Introduction

Working with a group of people is not easy. Systems and technology will behave in the same way all the time but people are purposeful — they think and act in ways they believe will improve situations. To change things you have to work together, exploring areas where there is no clear approach or consensus and where, to improve the situation, you need better ways of working rather than better solutions.

2. Begin at the beginning

The minute you know something that someone else doesn't you are both at an advantage and at a disadvantage. You are ahead because of what you know and you are behind because you need to explain what you know before someone else will agree with you. This matters because, in most situations you will need people to come along with you rather than stand by cheering from the sidelines or looking away, ignoring you completely.

If you are in the business of change, as many of us are, you can't do it alone. You need to work with others and that means coming to a collective point of view on many issues and, you may find that your views must also change in the process. If you wish to inform, persuade or educate, however, the place to start is with where your listener is right now.

This means that before you speak you must take the time to listen and learn. Take the time to appreciate what is in front of you and what you think of it. For example, as I write these words there is a man sat working. He is middle-aged, tall and in good shape. With close cropped hair and a technical air he is probably an engineering manager at a large manufacturing firm. He has a

laptop open but is taking notes using a large notepad and pen.

The way I'm working is very different. I'm using a laptop to type these letters. The editor I'm using is called `ed` — the standard UNIX text editor. If you haven't heard of it you're not alone. It's decades old, obsolete, described as *the most user-hostile editor ever created* and absolutely perfect for distraction free writing, with the right balance between feeling like you're using a typewriter where the only option is to keep writing and a word processor, where you can correct mistakes that must be corrected right now.

If I tapped the man on the shoulder and suggested he swap his pen and paper for my editor and terminal he would probably look at me as if I were crazy and try to back away to a safe distance. There is no way to get across the twenty years of geekery and experience that has led to the specific way I like to write — and it creates an intellectual gap so vast that it cannot be crossed in a single leap: you need a bridge to take them from where they are to where you want them to be.

3. Inspecting foundations

If you need to start with where people are right now, then you need to spend some time understanding their thoughts, beliefs and actions — the foundations that underpin their thinking. You need to explore five areas of their thinking.

What are their assumptions?

Assumptions are the basic beliefs that your client holds. Do they believe, for example, that man-made climate change is a hoax? Are they against teaching children about homosexuality? Do they believe the state should not be involved

in regulating business on the Internet? You must try and see the basic beliefs they hold clearly for what they are.

What standards do they hold?

Standards are what people think should be the case. For example, all children should have free school meals, university education should be free or that the highest earners should pay more tax. The standards people hold are usually a direct result of their beliefs.

What is the basis?

When you ask someone why they think the way they do they will look for evidence, for data that backs up their point of view. Some people may point to their religious texts, others to scientific studies or surveys and others to models and theories. The point for you, as someone wishing to change things, is not to question or attack the evidence before you but to understand it in the first place. Looking to understand without judgment is the point of the exercise.

Why are things the way they are?

If you then ask people to explain why they think things are the way they are right now, you will get an explanation that is based on their assumptions, standards and evidence, which will give you an insight into the logic of the situation as seen **from their point of view**. For example, the reason why they can't reduce energy by installing new, more efficient machinery is because their processes run 24/7 and the downtime is not acceptable in their just-in-time schedule.

What do they think will happen?

Finally, you need to understand what the future looks like from their point of view given everything you've learned so far. Is it optimistic and hopeful, sad and resigned or bleak and fearful? What do they see when they look forward and see time racing towards them?

4. Building bridges

Now that you know what the land looks like on one side of the gap you can start thinking of how to build a bridge to the other side. You have a specific end result — a landing point, if you will, and need to construct the sections that will connect one side to the other.

Start with language

The simplest way to begin is to treat the engagement like learning a different language as you visit another country. You know your own language, but if you want to communicate with the people of a different country you will get a better reaction if you try and use their own language. This means researching and finding the words and phrases the client uses to describe things and phrasing your thoughts and ideas using a similar approach. This doesn't mean cutting and pasting their words into your presentations. Instead, it's an attempt to understand and phrase things in language that is already familiar to them.

Work backwards

Tell them what you believe and then work back from there, using logic and evidence, to show the links that connect their beliefs with yours. For example, let's say you know a way they can make a saving but they don't believe it's possible. Your job is to start with the end result, which is the amount they can save, and show with examples, data and evidence why the concerns they have can be addressed and you can deliver the results you claim as possible.

Tread carefully on emotions

People often make decisions emotionally and then justify them with rational arguments. Be careful that you don't say things that can cause a negative emotional reaction because once that happens you may never be able to recover. Many a salesperson has found that a hard-sell approach fails just because their listener didn't like the way they were treated.

Address objections before they come up

As people listen to a pitch they think of reasons why it won't work — they naturally come up with objections. Your job is to think of those objections as you prepare your presentation, bring them up first and show how you are going to make sure they don't cause a problem. If you do this right then by the end your client will be nodding along and be able to listen to the benefits of the case you are making because you've fully addressed the risks they were concerned about.

Be honest

It's very easy these days to check any assertion someone makes. If they claim to operate in multiple countries, have a particular roster of

clients or say they have access to resources, it's relatively easy to validate that information just because of the amount of material available online now. Most companies will, in any case, carry out some form of due diligence so it makes sense to be up front about what you can do or can't do. This is especially important when you're trying to get them to move from their current point of view to the one you are putting in front of them. The minute you are found making a claim that isn't true the trust between you is breached and you can forget about completing that bridge.

5. Conclusion

This paper is about exploring two themes: learning to appreciate a client's point of view and constructing a narrative that helps them cross the gap between their point of view and your point of view. Of course, you may find that, in the process, your point of view also shifts. The end result is not really your point of view but a common point of view. As you take the time to appreciate their view your own thoughts will inevitably be influenced.

That is a good thing. Rigidity in thought and approach is not helpful when what you are trying to do is work with someone else. An open mind, on the other hand, will help you tell a better story — one the client can listen to and perhaps even accept.

About the author

Karthik Suresh is a Management Consultant who helps customers with energy, utility, sustainability, research, innovation and knowledge management projects. His experience includes working with large and small organisations to select and implement strategic decision systems, improve and develop management capability and deploy risk management, IT, communications and information systems projects.

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