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EXPERT CORNER

Out of the blue — into the black?

Accepting or rejecting a 'tryout' is a dilemma for small businesses

By **Andrea Obston**

The call comes out of the blue. It's the big one. It's the client you've had on your wish list for years. Or who's in the market segment you've been aspiring to enter. Or it's the headliner you've always wanted to work for.

But, there's a catch. They just want to try you out, to "see if this works." The problem is that you know the short-term approach won't cut it. Your experience tells you that a random act, on a short-term basis, most probably won't solve the problem. They need a car, but they only want to buy a wheel. If you sell them a wheel, they'll still have to walk to work.

Do you take on the project hoping it will grow into a long-term relationship where

you can really strut your stuff? Do you hope that "to know you is to love you"? The answer is yes and no. It depends on what the client hopes to accomplish and whether it's realistic for you to deliver it within the restrictions of the project.

Here are a few guidelines to make that decision.

• **Take the time to understand why.**

Find out what the client's goal is for the project. If the goal is unreachable within the timeframe, tell them and explain why. If the client's unmovable, respectfully decline to take on the project.

Your reputation is everything. If you're seen as an organization that makes promises you can't deliver upon, you won't recover — even if the "promise" was the client's idea. In the end, they won't remember that the unreachable goal was theirs. They'll only remember that you didn't reach it.

Turning down a job under these circumstances is something you have to do carefully. If you look like it's "my way or the highway" you'll never see them again. If you honestly tell them that you can't

deliver what they want up and live to your own standards, they may come back to you some day. You need to make it clear that walking away from the job is your issue and not theirs. If you do it right, they'll be impressed with your honesty and ethics. I've actually turned down clients under these circumstances and had them come back when they had the ability to get into a long-term business relationship.

• **Find out if the goal can be scaled back.**

If a client's never used a service like yours, they may not understand why their expectations are unrealistic. Offer them an alternative that gives them a similar benefit. For example, we had a client that wanted to establish their reputation as a thought leader in eldercare. What they really wanted was for us to get them a story in the AARP magazine. But that was simply not possible with a short-term effort. Instead, we got them a story in a trade magazine that's more focused called "Selling to Seniors." Once we got that, we



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secured the reprint rights and put the story on their website, giving it more viewers than just the readers of that one magazine. That moved them along the path to their goal and was a more realistic short-term deliverable. We promised; we delivered and we used the delivery to show we were capable of more.

• Avoid short-term projects that require you to short-circuit your process.

You know your business. A prospective client doesn't. Do not let them talk you out of following your time-tested way of doing things.

We have a process we follow that lays the groundwork for every project we take on. And every time we've allowed a client to talk us out of following it, we've been sorry. There's a reason most service providers like us have a step-by-step process for approaching a new project — it works. And if you skip steps, the final product will suffer.

For example, when we do Plans of Work we have a method for getting both the insiders' view of the company and the outsiders' view. A good brand is built on both. A few years ago, we had a client that refused to ask members of their board to provide input into the discovery process we use to get the insiders' view.

They felt it was asking too much of the board and would be an imposition on their time. We argued against it, but they overruled us. When we presented the final Plan of Work, the board sank it. They spent 45 minutes telling us why it wouldn't work. Whose fault was that? Mine. We didn't follow our process and the results felt wrong to those who needed to feel comfortable with them. Shame on me.

• Measure twice. Cut once.

The real purpose of accepting a short-term project is to prove your worth. You want to make the client realize that "there's more where that came from." To do that you've got to make the needle move. Even a little. And you've got to prove you moved it. That means finding a metric you can measure before and after you do the job. Make sure the metric is something the client thinks is important. Get their buy-in ahead of time that such a measurement is a good way of gauging success. For example, did they have 100 followers on their company Facebook page before the effort and 150 afterwards? That's nothing breathe-taking, but it is a 33 percent improvement. It moved the needle in the right direction, right? By the way, once you've bragged about the metric, make sure the client knows

it's just the tip of the iceberg.

The bottom line is this: short-term assignments can be a way into a prized client relationship or aspirational market segment. They can also do serious damage to your reputation. Establish guidelines. Create realistic expectations. Make sure to broadcast your results. And if you know in the beginning that you can't make these happen, walk away from the assignment.

Every one of us who have been in business for a while has a "little voice" inside us that takes the measure of a client or a project early in the process. Listen to that "little voice." She knows what she's talking about. Listen and learn from her or both of you will be sorry. ■

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