



Managing Unrealistic Client Expectations

By Daniel G. Frondorf, CPE, CDT

Most of us in the consulting estimating profession have been astounded by the expectations of our clients at various times. We think of these as unrealistic, unreasonable, unwelcome, undesirable, or simply unpleasant. Even our good clients, with whom we get along well, the ones who pay our invoices in a timely manner and whose professionalism we truly value and appreciate, can occasionally give us heartburn (and heartache) when we deliver our services.

After being in the business for almost 18 years, I categorize these unrealistic expectations into four main groups: schedule related, content related, client participation related, and client relationship related.

Schedule-Related Expectations

First, we'll deal with the schedule-related unrealistic expectations. These usually involve assignments from contractor clients who waited until the last minute to decide they'd like to bid a project, and they need us to get them a takeoff or scope review overnight, or even on the same day.

It's not unusual for the client to find out about the project at the last minute and for him not to want to miss an opportunity. But that doesn't change things for the estimating consultant, who has to put other work out of the way, pass on another project, delay one, or simply work extra hours to accommodate the request (even if that means working all night, on a weekend, or on a holiday). To be fair, it's not just

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the contractor's clients who ask for accelerated delivery, but, because of the deadline-oriented nature of construction bidding, they're usually the culprit.

Content-Related Expectations

Moving on to content-related unrealistic expectations, it isn't unheard of for a client to want information the consultant didn't provide. Maybe the consultant thought that the client just wanted a quantity takeoff, but what the client really wanted was both a quantity takeoff and a cost estimate. Maybe the cost estimate didn't provide a separate itemized takeoff, even though the quantities were incorporated into the cost estimate.

Often, the level of detail provided doesn't meet the client's expectations. These unmet expectations are almost always the result of poor communication between the client and the consultant, and often occur early on in a business relationship, when expectations and deliverables are more likely not to align.

Sometimes the client wants the information delivered by the consultant in a format they are familiar with, perhaps their own in-house format, but the consultant delivers it in his or her own format. Human nature wants us to see things in a familiar setting, and using a consultant can upset that, because something unfamiliar is introduced – the use of a third party to provide the project-specific information needed by the client for their purposes.

Participation-Related Expectations

The next category has given me the most frustration in the history of my estimating enterprise – the level of client participation in their own estimating process. I wish I had five bucks for every time I asked a client, "Did you read the report I sent you?"

Maybe this goes back to human nature, but I guess it's easier for a client to simply call or email and ask questions – even though the answers to those questions are in the consultant's takeoff, cost estimate, or report. Perhaps they yearn for us to tell them the answers immediately, instead of them becoming more knowledgeable about the job themselves, on their own time, by reading and understanding the information we've already provided.

It's probable that several days or weeks have passed, and that the consultant has moved on to another job, or many other jobs. To provide the answers now requires us to go back to that project, get familiar with it again, and dig up the location of the cast iron pipe (when the rest of the job calls for PVC, for example), or an answer to a similar project-specific question.

This kind of unrealistic expectation ties back into the schedule-related expectations, because (in my history at least) the client is either about to start the project, has already started it, or has a pre-construction meeting for the project scheduled in the next 30 minutes, and the specific information they are now asking you for requires a quick answer.

The thing I find most frustrating is that this type of unrealistic client expectation robs us of billable time, or otherwise disrupts the current project for which we are generating billable time. It puts the consultant in a difficult position – do we bill the client for the 15 or 20 minutes that these kinds of requests usually require, or do we eat that time for the sake of keeping a client happy?

Client-Related Expectations

Our final category involving estimator-client relationships is also derived from human nature: clients seem to assume that they are our only clients, and whatever is of concern to them at

that very moment should also be our main concern, even if we had no idea about it until they contacted us.

It's been said that "the customer is always right", meaning that we should go to any length to please them and keep them happy. I suppose that's true from a broader view, but to be practical, do we have to set aside all other clients just to keep one happy?

I've had this thrown in my face a few times over the years, in the form of a client's comment designed to remind me of "all the work we've given you" when I've had to tell a client "no," or that they will have to wait their turn. As business owners, we never want to make any client feel like they don't matter, or matter less than anybody else, and this is often the motivating factor that makes us accommodate unreasonable and unrealistic expectations.

Keeping clients happy often involves making ourselves unhappy, or at least more frustrated than we should be. This profession is challenging enough just providing accurate, timely, current, and project-specific information, even when we have been given plenty of time to fulfill an assignment.

Dealing with unrealistic client expectations causes extra work, and is usually unbillable. It also causes delays and problems with other projects, and forces us to say "no," or at least "not now," which can make us feel guilty or otherwise uncomfortable about not satisfying those who keep us in business in the first place.

How do we put a stop to it? I don't think we can – it's just another part of being a construction estimating consultant. Being resourceful and having better time- and people-management skills is just another hat for us to wear.

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