Working with difficult internal clients

By Carol Graff

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How many times have you fielded marketing research requests from internal clients who think they know it all? Who dictate the methodology that must be used? Who insist on being involved in every detail of the project or who play "hands-off" until the very last minute and then change everything?

Working with difficult internal clients can be challenging for any corporate marketing research department. Being on the research supplier side, we sometimes counsel clients on how they can better respond when faced with tricky situations. Here are six common situations our clients have encountered and some suggestions to consider.

Situation #1: *The internal client requests expensive research which you believe is not necessary.*

The client requests a project for which you already have a study with and the data is less than a year old. However, the client doesn't "trust" the research.

Suggestions:

If you don't have a "formalized" and "socialized" objective process for requesting marketing research, now is the time to develop and communicate that process! A solution to this situation can be simply allowing the request process to work. If you've built-in guidelines about reviewing existing studies prior to commissioning new ones, then perhaps you can use that point with your client.

If this is a trust issue with the methodology, the person in charge of the study, or the analysis of the data, be clear on your client's objections. Exactly what or who doesn't he trust? What would make him feel more comfortable, relying on this data or funding an entirely new study?

Get creative. Suggest an inexpensive and quick telephone study with the target audience to attempt to verify the known research results. Have him listen in or tape the interview (with the respondent's permission) and play it back for him. Your challenge is to provide the client with information he can trust.

Situation #2: *The marketing research department sits on a new product committee and recognizes a need for research but the client is unwilling to invest.*

If you've run into this situation you know that frustration levels can escalate quickly. Marketing research folks tell us that frequently research is perceived as not being needed because the internal client "knows what's best for the customer." This "knowing" can be gut feel, it can be the result of listening to a select few "squeaky" salespersons or from just briefly talking with one or two targeted customers. In any event, your expertise tells you that more significant data is required before the new product is produced.

Suggestions:

This is a great opportunity to demonstrate the benefits of conducting marketing research.

One suggestion we've seen work is to not become agitated over this situation — that will only make the anti-research camp dig their heels in further! Rather, pick one or two critical issues for which you believe strongly that research is absolutely necessary. Document why you believe the research is necessary. In this documentation, try to link decisions with revenue or market share/penetration (if possible) or cost reductions. For example:

"Without knowing the market's preference for the _____ feature, we could be at risk of losing a __% share among the _____ market segment. This could translate in a drop in new sales projections of $ ___."

Or, make the statement more positive:

"By knowing the market's preference for the _____ feature, we could minimally gain a __% in market share among the _____ market segment which could translate to a $ ___ increase in the forecasted sales projections."

Many times, seeing the impact of doing research translated to numbers can have the power to sway a wary client.

Situation #3: *The research is necessary but you want to propose a different methodology which you know your client opposes.*

Here's where it gets sticky. We've seen this scenario played out many times especially when it comes to telephone interviews, online research or new, infrequently-tried methodologies. The internal client may have a bias against these types of research for all sorts of reasons. They only trust what they can see — observing a focus group vs. trusting a telephone interviewer. Online studies are too new, not proven, something they don't have confidence in, etc.

Suggestions:

Understand the history behind your client's opposition to the methodology you have in mind. If he's been burned by unscrupulous telephone interviewers or has used online survey results that were found to be tainted, you need to be aware.

Next, create and share a list of the pros and cons behind both the methodology he's requesting and the approach you believe is best for the request. (Note: We recommend you have this list available for all types of methods and update it frequently. Add testimonials from others in the company who have also successfully used these methods.)

If the client still balks at your method vs. his, suggest a mini-study using both types of methods to test the approaches. Yes, you may have to invest some additional funds up front. But this may pay off when you can demonstrate why the ultimate results of the methodology will be of higher value.

Situation #4: *You have an internal client who does not have confidence in the marketing research department and has independently jobbed out a research project.*

Wow, this is frustrating! You know your research department team — they are experienced professionals with only the best interests of your company in mind. But maybe a few balls were dropped on projects in the past, or a research result was unduly questioned by management. Now you have someone going around you and it's quite unnerving for you and your staff.

Suggestions:

If you're in a situation where you need to rebuild credibility and don't have total management support, meet the difficult client where she is at. Meaning, admit to the problems your department has had and ask the client for an opportunity to partner with her on this study.

By partnering we mean acting as a consultant of sorts to your client. She has hired a resource — it's a commitment that can't be undone. So work with what you have. Suggest ways that you can act as an objective, third party to the research project to offer assistance and guidance.

Be visible with this client. Request to be part of any pre-testing efforts. Suggest that the client forward you copies of interview or discussion guides so you can keep current on the study's progress. Ask if you can sit in on the focus group to observe.

Resist the urge to be critical. Tell the client what's going right. Only offer suggestions for change when it is crucial to the outcome of the study. Credibility is rebuilt slowly. If your client can see you as adding value to the project, she may be more likely to not go around you next time.

Situation #5: *The client is micro-managing both the research project and the research suppliers' personnel.*

This behavior may be observed with management new to their jobs or new to a particular project or those who have a high need to be in control. They can become nitpicky about every research objective, they re-write interview/discussion guides, they question the order and number of survey questions, they are a constant source of irritation for you, your supplier and the people directly working on the study.

Suggestions:

This situation is actually one of the easier situations to solve!

Whatever you do, hold back on barging into the client's office to demand that he stop calling the research supplier 17 times a day! That will only make the situation worse.

Instead, sit down with the client and share your perceptions that he seems overly concerned with the study. Ask to go over the project's objectives again. Ask the client to give you a rundown of where he is disappointed in the project or in people's actions. Acknowledge his concerns and suggest a new way to handle the project. Suggest a weekly meeting, either on the phone or in person with both the supplier and any other key players on the project. Gain agreement that this would be an effective way to improve the communication with the supplier and your department. Ask the client to develop a list of what's going right, what's going wrong, and any concerns he has. In that weekly meeting — limited to one hour and no more — go over all his issues and come to some sort of closure on how to handle each problem.

This type of reaction acknowledges your client's need to be in control, but you are now managing the amount of control, limiting it to specific issues and only an hour a week of interruption versus daily interaction. If the client starts slipping into his old behaviors, step in immediately and remind him of the agreement you both made to the process for resolving this situation. Ask for his help in allowing the process you've both agreed upon to work. Thank him for his ongoing cooperation.

Situation #6: *The client is laissez-faire about the project they've requested, taking a hands-off attitude until the project is underway, and then begins to challenge everything.*

Unlike Situation #5, this one happens more frequently among busy executives who are effective in delegating, but then get nervous that perhaps they've put too much trust in the marketing research department and need to get "back in the game" before it is too late.

Suggestions:

Once you've been in this situation, you promise yourself it won't happen again. The best way to manage yourself out of this one is to not point fingers at the client. Don't suggest that the client should have gotten involved from the get-go — that will only make you feel better momentarily! Instead, work to establish a rapport with the client.

Be clear on what she is unhappy about, what's bugging her about the project. Pull out the objectives. (Are you getting sick of hearing this one?) Make certain the project is in alignment with the goals. Review the questionnaires, discussion guides, other research materials. Understand where your client is uncomfortable and work towards a quick resolution plan to diminish her level of uncertainty.

Frequently update the client on the status of her project. Identify barriers you encounter. Share the good and bad news about early findings. Make sure the communication lines are open and free flowing.

If the client starts slipping into his old behaviors, step in immediately and remind him of the agreement you both made to the process for resolving this situation. Ask for his help in allowing the process you've both agreed upon to work. Thank him for his ongoing cooperation.

Build her sense of trust in you, your department, and the supplier. The more she believes she can truly delegate to you, the less she may be inclined to continue challenging the project.

Proactive steps

Here's a list of proactive steps you can take now to diminish the frequency of having to deal with difficult clients:

1. Document and communicate your department's function. Establish a written departmental functionality statement of how internal clients can work best with the marketing research department. Inform them how you are structured, what responsibilities you have, what services you offer and how they can benefit from your services, etc. Make it short, easy to read, etc.

2. Create/update a short marketing research project request form. It can be an online format, voice-activated, or good old pencil-and-paper. Test it on both some heavy research users and on those who infrequently use your services. Fine-tune the document so it is streamlined, easy and quick to complete and not a barrier to using your department.

3. Use pictures to paint the process. Develop a visual that shows internal clients the process that's taken once a research request is received. Make it client-friendly — don't make them jump through too many hoops.

4. Get objectives in writing. Always, always, always insist on written research objectives showing what the project is to deliver and what will be done differently as a result of receiving the research information. This is the place you can always come back to when difficulties arise.

5. Be a partner not a gatekeeper. Many times, people in organizations have said that they resist working with their marketing research department because researchers can be rigid, speak in acronyms others don't understand and sometimes seem less than helpful at getting the job done. They view research personnel as more concerned about rules being followed than results being achieved.

So relax! All the rules don't have to followed perfectly all the time. Practice good research skills — ask lots of questions, clarify concerns. Be willing to bow to the client's suggestions. Look for ways to compromise. Communicate frequently and succinctly. Resist criticism. Ask for support. Your job is to be seen as a valuable resource, not a gatekeeper!

6. Market your department. People like to work with people who can help them. So publicize success stories. Show how research, when done correctly, can make a viable difference to a project's success. Use numbers as much as possible. Position your department as a winning place to get answers.

7. Innovate! Keep looking for new methodologies, new suppliers, new moderators, new recruiting techniques, new ways to cut costs, new ways to hasten results, etc. Don't get stuck in doing research the "same old way." Embrace change, try new things.

8. Be trustworthy. Resist the temptation to bad-mouth difficult clients. Counsel your staff to model your behavior. Keep your professional cool. Be someone the internal client feels they can talk to and trust.

9. Ask for support when you truly need it. When a situation is clearly going south and you've tried everything, ask for management's support. Be clear on what you want and how it will benefit the project. Don't call in the cavalry just as back up. Use management clout rarely — when it is critically important.

10. Keep a sense of humor. The business world is rapidly changing and in a state of nearly constant flux. You will have problems. Things will not go smoothly. Not every internal client will like or respect you. Keep focused on your goal and take time to laugh a bit on the way. You can be successful without being stressed out.

11. Treat your internal clients like your best customers. Even when they are difficult, think of your internal clients as customers you need to better understand to "make the sale," to "get the business." Thank them for their business. Ask them to refer your services to their colleagues. Survey them to measure their satisfaction and implement ideas they have for your department.

12. Keep learning. In today's changing business environment, your challenge is to keep growing and learning more about your company's business and encouraging your staff to do the same. Go to trade shows, read industry literature, research your competitors, tag along on sales calls, listen in on service calls, have lunch with an engineer, visit with your external customers. Keep on top of what's happening in your department, your internal client's world and in your external customer's mind.