"If only I'd known" is a time-honored lament among civil engineers who learn, too late, that a client's or client representative's dissatisfaction has led to a claim. I'd feel badly for the folks involved had they not had every opportunity to learn what they needed to learn and establish a plan to help prevent precisely the predicament they find themselves in.

In an article reporting on "the seven habits of highly effective engineering firms," Terra Insurance Co. CEO David L. Coduto reported that being responsive to client representatives' symptoms of dissatisfaction is a common trait among those Terra owner/insureds that had not reported a claim in the last 15 years or so. They know what the symptoms are, and they teach all personnel how to spot the symptoms and to whom to report them; preferably to a trained member of what I (being fond of acronyms) like to call a Special Procedures And Tactics (SPAT) team.

Know When the Symptoms Are Most Likely To Arise

Not all problems stem from clients, of course, but most do. It's therefore important to know when client representatives are the least bit unhappy with you or your firm. Client representatives signal their unhappiness through a variety of behaviors that project managers need to be alert for, especially after their client representatives have had to contend with some type of difficulty caused or seemingly caused by a project manager. Unfortunately, when it comes to mistakes, any number of project managers are "but-heads"; e.g., when the project manager: fails to meet the schedule ("*But* the client increased the scope"); exceeds the budget ("*But* I told the client representative that might happen"); irritates someone the client representative likes or reports to ("*But* that person is a complete idiot"); or is being blamed by a contractor for delays, changes, and overruns because of alleged errors or omissions in the plans and specifications ("*But* those plans and specs are just about perfect").

See Things as the Client Representative Sees Them

Rule one: To prevent problems from the get-go, train project managers to look at things from the viewpoint of their client representatives and be willing to accept blame when it's appropriate to do so (as a general rule, they should never say they committed errors or omissions). Example (assuming you are the project manager): You forgot (a.k.a. didn't think it was necessary) to mention to the client representative that the additional tasks he threw into your lap would add two weeks to the completion date. You burned the midnight oil to get it all done well in just nine days. "I got your deliverables. I was expecting them last week." is the message the client representative snarls into your voice mail. Your reaction? (Deeeeee-fense.) Probably something along the lines of, "That ingrate. What'd he expect? That he could add all these scope items and it wouldn't take any additional time? I killed myself to get him the deliverables when I did."

Righteous indignation is good for starting brushfires, but little else.

In fact, the client representative doesn't know what you know because you didn't take the time to educate the client representative. Without that education, why would the client representative assume that more scope would mean more time? Why wouldn't the client representative assume that you could simply integrate the new "stuff" into the existing scope, and still come out on schedule, assuming (and reasonably so) you had planned to come out ahead of schedule to begin with (i.e., underpromise so you can overdeliver)? In other words, if you want to be ticked off at someone, look in the mirror.

Often more important: The client representative, being employed by a large organization, reported your schedule to his boss, who gave it to her boss, and so on up the food chain, meaning that a delay (or budget overrun, or unanticipated condition, etc.) would lead to problems cascading down on your client representative's head, neck, and shoulders…all of which the client representative would regard as your fault.

Had you understood how a client representative might see things, you, first and foremost, would have done whatever you could have to have helped the individual succeed in his own organization, typically by helping him overdeliver.

Second, by being sensitive to the individual's needs, you would have done whatever you could have done to have minimized the potential for unpleasant surprises, by informing the individual as at early a date as possible that the schedule or budget would not be met.

Third, even when it should have been obvious that the scope change would have added time or fee to the project, you would have taken nothing for granted and so would have made sure the client representative was aware, and you would have confirmed that awareness through some type of writing, like an e-mail ("Hi, Bill. I'm writing to memorialize our conversation. As we agreed…").

Fourth, if you forgot to inform the client representative of something ("But any fool should have been aware of that"), the client representative would have been expecting you to be apologetic, humble, and eager to do something to turn the client representative's disappointment, dismay, and anger into delight.

One More Time: Engineering Is All about People (Including You)

Firms that avoid claims and litigation understand human behavior. They realize that disputes and litigation are caused not by errors or omissions, but rather by people's response to those errors and omissions; by their attitude. They also understand the cost of claims and litigation, and thus can quickly create a claims prevention budget based on the value of litigation avoidance.

So, all of that notwithstanding, there you sit, totally taken aback by the client representative's angry voice mail message. Rather than curse the client representative, say to yourself what you need to know to be true: "Something I did or didn't do has ticked off the client representative." That should be enough to create some clarity and, even though we haven't discussed symptoms yet, you should know that a client representative's angry voice mail is a symptom of trouble ahead, and that means you have to respond…IMMEDIATELY! Unbelievably, any number of project managers do not, because they haven't been trained to. Rather than get into a confrontation with an angry client representative, they seek avoidance in the comforting – but false – notion that "This will probably all blow over if I ignore it long enough." Lotsa luck.

In two months, "Risky Business" will focus on more symptoms and response actions you can take.