

# Avoiding Client/Contractor Nightmares Best Practices for Contractor Management

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*You've secured the budget to produce some badly needed, high visibility deliverables. Part of that budget includes funding for contractors. To help manage and guide the communications between your contractors, your staff, and your management, you want to use your company's best practices.*

*The best practices of the contractor or provider firm you employ should closely match your own company's best practices. Beginning on the "same page" will eliminate headaches and expenses during the lifecycle of the project. A quick comparison of practices and procedures enables you to proceed with the project confident that you are using competent outside resources.*

## CLIENT/CONTRACTOR NIGHTMARES

You've gotten authorization to bring in contractors to get a couple of backlogged projects done. You've heard horror stories from the "old days" - the distractions and the expense and the virtually useless deliverables. How do you keep history from repeating itself?

### **Understand Your Corporate Culture**

How would you describe your corporate culture? Does it embrace change or does it resist and resent outside "interference?" No matter how skilled outside contractors might be, if they encounter internal resistance, the project is at high risk of failing.

The reasons for resistance - and for internal sabotage - are many, including perceived threats to existing jobs and an "us versus them" mentality. An effective counter to resistance is open selection of the provider and/or contractors. Involve all stakeholders, then make sure that everyone starts "on the same page" by clearly stating project expectations.

### **Clarify Project Expectations**

What outcomes do you expect from the project? What is your timeframe and budget? Being specific up front - about your project, its duration and any challenges - provides internal stakeholders and potential contractors with information they need to go forward fully informed.

A provider should be able to present a proposal that fits your project and any project-specific constraints. Your

project should not be shoe-horned into a contractor's proposal or project template.

When setting expectations, also make sure that "quality" is not only concretely defined but also universally agreed upon. Insist on quality metrics or employ internal standards. Try to leave little open to interpretation.

### **Select Providers/Individuals/Teams**

The technical communication profession has changed in the last two years with the tightening of the economy and the elimination of many contractor positions. While some of the best providers have gotten better, beware of those who have simply gotten better at surviving.

When selecting a contractor provider or an individual contractor, make sure to thoroughly interview them. What is their track record? What deliverables have they produced and what return on investment (ROI) have they provided clients? How do they manage projects, and how can they customize their approach to fit your particular project?

IBM, under CEO SAM Palmisano, is actively retrofitting their business into a model of active service-provider/partner. His goal is to make IBM far more a side-by-side partner with business clients - enabling businesses to improve their marketing, planning, procurement and customer service -rather than merely supplier of hardware and software. In today's fast-paced environment, this is a model that insures a successful working relationship with contractors and providers.

Customization is particularly important with large projects. You should have a choice from a range of professionals - both highly skilled and others. Remember that not *all* individual consultants' skills need to exactly match your company's tools. Look for qualities, such as a breadth of skills, which can translate effectively into your project.

### **Kick off the Project**

The best insurance for getting everyone on the same page is the project kickoff meeting.

The provider should be able to demonstrate their own internal kickoff agenda. The agenda will include time to bring the team up to speed on project management

forms, communication forms, rules of behavior on the site, issue resolution processes, and the project proposal.

The kick off held at your site should have all the project stakeholders in attendance. The provider should be able to explain their understanding of the project and their understanding of the various roles and responsibilities attendant to it. Additionally, at this meeting, a project timeline should be sketched out, so that subject matter experts understand their pivotal role in the project and approximately when they will be solicited for interviews, reviews, and final review. A timeline focuses stakeholders and helps avoid misunderstanding of how early or often subject matter experts are involved. It also demonstrates commitment and professionalism on the part of the provider.

The meeting should be informal and interactive. Stakeholders should be willing and able to contribute even at this early stage. The process of building a timeline (usually from the due date, unfortunately) can demonstrate urgency and timing requirements. This process will also give stakeholders a feeling of how much work has to be done, and what the benchmarks should be.

A good provider should be able to quote industry standard metrics of pages per day to let subject matter experts and all stakeholders know how work-intensive technical communications can be. Setting expectations can mean everything to a project, and the kickoff meeting is a great means for setting expectations.

### ***Establish a Project-Specific Process***

Industry leader, JoAnne Hackos says “Quality happens as the result of a well-managed, well-organized process.” One of the important things about this kind of process is that it has replicable results. A well-managed, well-organized process is replicable and easily aligned with a good provider.

First steps first; have all the logistics under control before the project starts. If contractors need passwords, get them. If they need workspaces, such as cubicles with computer equipment to work in, get them. If they need passes to access the building, get them.

Plan with your contractors or provider how communications and progress tracking are supposed to go. Does the provider seem disinterested in benchmarks in project tracking? If so, find another provider. You deserve assurance that your contractors are as impassioned and capable regarding this project as you are. If they seem disinterested at the beginning, it won't get better toward the end.

Your provider should be able to not only work through process issues with you, but also provide helpful advice and work plans to enable you to manage the project in a

proactive way. With the unexpected always at the ready on a project, you want the provider to have been working proactively with you as your partner, demonstrating intelligent, proactive problem-solving right from the start.

### ***Insist on Timely and Consistent Reporting***

The last thing in the world you need is status reporting that doesn't actually give you an idea of what's really happening with (or to) a project. Real life offers lots of examples of attempts at diplomacy that yield almost no information at all. Any contractor or provider you choose should provide weekly status reporting that marks the progress of the period, approximate position relative to the benchmarks, and documents any issues or obstacles that arose during the period. Any alerts that require your immediate involvement should be given to you verbally, but the report also documents the issues. It would be the best of all worlds if the provider also gave you a solution proposal for any documented obstacles.

It is important to have these reports. You will be required to report the progress. Without good reporting, there is no way to gauge the effectiveness of the work, nor is there a way of determining simmering bubbles that will soon rise and pop, leaving a gooey mess to clean up, likely to be in the nature of budget overruns.

### ***Insist on a Maintenance Program***

Good providers will also provide support to both the contractor and the client during a project.

Some projects are stressful by their very nature. They happen to all of us. With stress over time, odd behaviors sometimes display, interfering with timely completion of quality work. Tempers flare. Absenteeism rises. Benchmarks slide. It is best to be proactive about any such issues.

Our market is legion with stories of providers who meet the contractor only when placing them and never setting eyes on the contractor again. Often the contractor develops a feeling of isolation. The “them vs. us” cultural situation can come into play with serious consequences. Work quality suffers.

A quality-focused provider will be proactive about provider-client relations. Commonly referred to as account management, project management or project oversight, the contractor is assured that their project matters. Outward signs of proactive efforts might be a provider representative bringing cookies, goody bags, or chocolate, or possibly taking the contractor to lunch. In time crunches when a nice long lunch is impossible, the prospect of free movie tickets helps to soothe the weary bones just for a little while, and it's an inexpensive way

to express support. A chat about how it's going and what's left to do assures the contractor that things are not being overlooked and that their contributions of care and quality are appreciated.

### **Set it Right**

Despite all the precautions and planning, sometimes things just don't work with a contractor. The best intentions didn't prevent issues that simply are unworkable. Know what the contractor or provider is willing to do if, assuming all good faith on everyone's part, something is just not "right."

A good contractor should be willing to make up work, or re-do work that was not completed in a high quality way, or is inaccurate. They should also be prepared to pull out the stops to meet a deadline, especially if time was lost on their account. The provider should be willing to step forward and ensure the situation is corrected and a plan to go forward is workable.

Sometimes communications degenerate to a "finger pointing" level. If you are working with a good provider, they should be able to not only put the issue at rest, but assist in working out a real win-win solution that makes everyone comfortable. It's important to know what kind of "exception process" your provider has to handle the "exceptions" of a project.

### **Debrief & Celebrate**

The best projects end with everyone very happy with the results and more than a little regretful that it is time to move on. Even on the best projects, there are lessons to be learned.

Your contractor or provider should be ready and capable of debriefing after the project to pinpoint what went well and to be open to process improvement. Do you have some ideas for your provider that would make them more effective in servicing your needs? It's important that you are comfortable in working with a provider in this manner, so that all your projects with them go smoothly. Through a debrief process, you can ensure that you always have a ready resource partner who is truly as committed to your successful projects as you are.

Celebration of a job well done is a point of closure for you, for your internal staff and for the contractors. It's important to "close" one project completely, so that diving into the next project is mentally and emotionally feasible. It's possible for bits of a project to carry over for months. Some of this lingering is a normal reaction of competent people who are unable to "go forward." Developing a tradition of celebrating the completion of a project helps all the stakeholders form an endpoint in

their minds, and allows them to enjoy the success of a project.

### **End the Client/Contractor Nightmare**

A completed project that is marked with well defined benchmarks is a great way to assure career success. It's also a great way to encourage upper management to permit the resources when you need them, and to guarantee subject matter cooperation on your next project.

Aligning your project benchmarks with a contractor's and/or a contractor provider's assures an erasure of the old negative history of client/contractor nightmares.

## **REFERENCES**

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