



## Client or personal friend? How to create boundaries between business and personal relationships.

By Anne Scarlett, printed in *Structural Engineer* and the *AE Marketing Letter*

As business developers, we are strongly encouraged to get to know our prospects and clients on a personal basis. When all else is equal — expertise, services, proven track record — we recognize that our relationships will set us apart from our competitors. Let's face it, even when comparisons are unequal, solid relationships can often be that extra something that boosts an underdog into a more favorable position. They always say: "people do business with people they like" or "when your client gives you his home number, then you have a true relationship."

In business, creating strong relationships can indeed be highly effective to develop long-term clients. There is a point, though, where we may find ourselves crossing boundaries, converting a potentially fruitful business relationship into a personal friendship where doing business seems inappropriate. This often happens when cultivating a 'late-stage' buyer — one that requires a good deal of nurturing over time. Surprise! Now you're spending holiday weekends with your client and his spouse, going to their daughter's wedding, and tailgating at ballgames. In relationship-building, how does one continue to pursue new business from a prospect with whom he unintentionally developed a personal friendship, but from whom he has still not received new business? And, moving forward, how does one grow a professional, pointed business relationship while also keeping it genuine? Here are some tips to walk this fine line successfully:

**Stay focused on the purpose of rapport.** Rapport in a business environment is not intended to get you a stand-up part in your client's wedding. No; personal conversations with prospects are simply intended to build comfort and trust. During the relationship-building process, ask yourself, "Is this an activity that will help build comfort and trust? Or, is this an activity that is far more apt to create intimate friendships?"

**Set yourself apart as an expert.** While your client may enjoy making friends, he also has a job to do. When it comes down to it, his performance may be partially evaluated on his prudent selection of service providers. Make it easy for him to validate his choice by positioning your firm's expertise, with clear differentiators relative to your competition. By becoming the best solution to your client's problem, you will offer him value. Help him do his job well by hiring your company, which will, in turn, make him look good.

**Pre-plan and articulate business intentions.** When you are engaged in a client call, prepare an outline in advance to ensure that you will hit all the key points while maintaining a thoughtful balance between personal rapport and business objectives. To manage everyone's expectations, commence the call by conveying the purpose: "We've connected today to discuss how our companies might mutually benefit from teaming on the airport terminal project. We'd like to learn about the challenges you anticipate as program manager, and we'd be glad to share our successes in the transportation sector. Then, we'll decide if it makes sense to move forward." By stating the purpose and referencing your pre-planned outline of objectives, you may have time to weave in personal rapport to make it good-natured and fun!

The aforementioned words of advice are helpful when cultivating a brand-new client, but maybe you have already inadvertently crossed lines from business relationships to personal friendships. Or, perhaps you have pre-existing friends with whom you want to do business. I recently brainstormed on this subject with John Hattle, a business friend (and past client!) from Gilbane. John shared some promising ideas for making personal friendships work in the business environment.

Here are two ways to respect an existing friendship while cultivating new business:

**If you can't directly ask a friend for business, then ask for help instead.**

You have a childhood friend that works as a project manager for a commercial real-estate broker; you feel uncomfortable 'selling' to him. However, it is perfectly within respectful bounds to ask him for intelligence about his competitors. Even better, how about asking him to place a call on your behalf to a company where he has relationships...perhaps a firm where he once worked? This serves two purposes. It gets you to a warmer call, because the prospect will have already heard great things about you and your professional capabilities. Second, it may (eventually) be a prompt to your friend that perhaps he should hire your firm to provide design services for their new corporate office build-out. Asking your friend to be a third-party champion, aka an impressive referral source, is well within the bounds of friendship.

**Give the prospect, your friend, a choice.** In this scenario, offer your prospect a different contact person within your firm. Let's say you have spent years nurturing a prospect that serves as the physical plant manager at a large university. Through this effort, you have evolved into personal friends. You want his business, but through your friendship you have learned that his dad passed away last year, he likes ketchup with eggs, and your youngest children are perfect partners-in-play. Your perspective has changed and you can no longer serve in the best interest of your company (who hired you to develop new business, not new friends!) You believe that your company could provide solid engineering services to this university, but you don't feel comfortable pitching the business. Now what? Be forthright with your prospect-turned-personal-friend: "Isn't it wild that we became friends because my company wanted to do business with your university? Let's revisit that original intention. I'll introduce you to a trusted colleague who can work with you on a business level." This unbiased colleague will handle future business activity with your friend — to pitch work, to follow-up on an unpaid invoice, to resolve project glitches.

While there are exceptions to these observations, the majority of us business development folks need to be mindful of boundaries in relationships. Bring business into your work by engaging in activity that fulfills your purpose and obligation to the company. And invite joy into your work by being friendly, honest, and sincere.