

# 10 BEST PROJECT MANAGEMENT

Practices for Working with Clients

**KARIM MARUCCHI**

Chief Executive Officer

**Crowd Favorite | Forty**



# WHAT TYPE OF CLIENT IS IT?

Define Who Are You Selling To Early,  
& Understand How This Alters Your  
Implementation

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DIFFERENT TYPES OF CLIENTS REQUIRE  
DIFFERENT PROCESS AND “VOICE”



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# THE RIGHT "SIZE" AGREEMENT

Select The Right Type Of Document To  
Establish A Baseline For Expectations

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PROJECT SIZE WILL HELP DEFINE THE  
PATH, SOW, PROPOSAL & CONTRACT,  
OR MSA



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# SET EXPECTATIONS EARLY

Clearly Defined Expectations  
Will Prevent Issues Later  
& Establish A Path For Success

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THIS IS THE TIME TO REALLY LISTEN, DON'T  
KEEP SELLING YOUR LAST PROJECTS



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# COMMUNICATION IS CRITICAL

Communication Is Proportionate To  
Client Happiness & Overall Project Success

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ALWAYS ANCHOR YOUR CONVERSATIONS  
TO THE ORIGINAL



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# DOCUMENT ALL THE THINGS

The More You Document,  
The Less You'll Debate About Later

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FOLLOW UP EVERY MEETING WITH  
A REPLY RE-STATING YOUR POV



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# NEVER SAY NO

Help your clients SELF-SELECT  
a REALISTIC path to success.

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USE THE SPACE/TIME CONTINUUM TO  
YOUR FAVOR



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# MANAGE CLIENTS DELAYS

Continue To Actively Reach Out To Clients If  
They Go Dark.

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DOCUMENT ALL COMMUNICATION SO  
TIME DOESN'T WORK AGAINST YOU



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# BEFORE BETA/UAT

Reread Your Contracts, SOW, Project Updates & Any Other Documentation

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THIS IS A GREAT TIME TO REINFORCE EXPECTATIONS & READJUST THEM AS NEEDED FOR THE LAST DELIVERABLES



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# SCOPE CREEP IS NOT BAD

First Make Sure It Passes The  
"Common Sense Test"

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USE THE TOOLS YOU ESTABLISHED  
EARLY IN COMMUNICATION TO TRADE  
OFF TIME/MONEY



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# YOU ARE A PROFESSIONAL

Lack Of Knowledge Creates Anxiety, Its  
Your Job To Walk Them Through It.

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DON'T EVER MANAGE THE PROJECT BY  
REACTING TO THE CLIENTS  
STATE OF MIND



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