*A Guide for SBDC Consultants and Their Clients*

This guide summarizes key insights from the March 2025 Minnesota SBDC Peer Consultant Exchange, where seasoned consultants shared practical strategies and personal lessons on managing client relationships effectively. Whether you're new to consulting or looking to refine your approach, these takeaways can help you guide clients with greater clarity, consistency, and impact.

**✅ Core Practices of Strong Client Management**

**1. Set Clear Expectations from the Start**  
Clarify what your role is, what you can (and can’t) do, and what’s expected from the client. Define success together and revisit expectations as needed.

**2. Recognize When to Pause or Redirect**  
Not every engagement is a fit. If a client is consistently unresponsive, resistant to guidance, or not taking action, it may be time to reset the relationship—or release it entirely.

**3. Focus on Impact, Not Just Activity**  
Good consultants help clients *move forward*, not just meet. Use your time together to reflect, plan, and hold clients accountable to their goals.

**4. Communicate with Clarity and Care**  
Small adjustments—like restating the next steps, using recap emails, or asking reflective questions—can shift conversations from reactive to results-driven.

**💡 Techniques Shared by Peer Consultants**

* Use intake or pre-meeting questions to focus conversations
* Share written summaries to reduce confusion and improve follow-through
* When repeat issues arise, ask reflective questions like, *“What have you tried since we last met?”*
* Set time boundaries—don't let client sessions become indefinite check-ins
* Let silence work: allow space for clients to process and think

**🙋‍♀️ Mindset of a Successful Consultant**

* **Coach, not crutch.** Help clients help themselves.
* **Collaborator, not fixer.** Progress is mutual—it requires effort from both sides.
* **Strategic, not reactive.** Be intentional about your time and energy.
* **Professional, not passive.** Set boundaries, be honest, and don’t over-promise.

**🤝 For Clients: How to Get the Most from Your Consultant**

* Show up prepared and follow through on action steps
* Be open to honest feedback and new approaches
* Communicate openly—let your consultant know what’s working or not
* Take ownership of your goals—this is your business, and we’re here to support it

These strategies are just a few of the many ways consultants can create meaningful, successful client engagements. Every client is different—and every consultant brings a unique style, background, and approach to the work. There’s no one-size-fits-all method. The key is to be intentional, reflective, and open to evolving your process.

**Trust your instincts. Learn from others. And above all—find what works for you.**