How to have a Successful Client-Contractor Relationship
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INTRODUCTION

Every day we are met with increasing demands in our work place: time constraints, insufficient people to do the work and limited expertise to deal with complex issues. When the demands exceed the company's current capabilities external experts are invited into the company to perform specific tasks. These 'life saving' persons are better known as 'Contractors'. Unfortunately, there are times when the Client-Contractor relationship runs into problems. However, SPS has over 10 years of experience of dealing with Client-Contractor relationships and this paper offers some guidelines to maximise your degree of success.

This paper only deals with situations where a SAS contractor/consultant is seconded to a company to complete a set task and does not cover the area of project management. The first part discusses key points concerning the Client and the second part focuses on the issues the contractor should be aware of. The final part contains a summary of the main areas where contracts run into difficulties.

THE CLIENT

Background

Let us picture a familiar scene. It is 11.30 am Monday morning and you have just discovered that the board of directors are convening in 2 weeks time to discuss a project you are responsible for. The data still has to be analyzed and reported in SAS and all your 'SAS' people have been injured in the company limbo dancing competition in Majorca. You contemplate your options and finally decide that you will recruit some SAS contractors. However there is another problem. You have never had SAS contractors in-house before and really do not know what to do. Well long gone are the days of 'Hope and See'. By following key points you should be able to find the right person for the job and feel confident that the work is completed on time.

1) Proposal

• The first thing you should do is have a clear description of the work that needs to be completed.

• Have a realistic time plan. Outline when sections should be completed. This will be useful during the contract as a monitor to see if the work is on schedule.
Initially this may seem like 'time wasting', but having something solid to work with provides security for both parties. Without a proposal and time plan contracts can easily run into problems. It has happened that the contractor's interpretation of the work is a far cry from that of the client! This can lead to all types of problems, the worst being that the contractor realises once the contract has begun that he/she does not have the experience or SAS knowledge to complete the assignment.

2) Interview

- Ideally, the more time you have to look for a suitable SAS contractor the better.
- The interviewees should be aware of the requirements of the contract prior to the interview.
- Decide whether they will fit into your team. It can be unpleasant for your fellow colleagues to spend the next 2 weeks in the same room with a person they really do not like.
- Check the interviewee has the correct environmental and SAS experience.

3) The contractors first day

- Introduce them to the people they will be working with.
- Explain the relevant internal hierarchy of the people they are working with and also mention who they can direct their questions to.
- Guide them through the system and show them any in-house packages they will need to use. Remember, what may be familiar and obvious to you may not be to a person that has never seen that package before. At this point try not to waste valuable time. Only show the basics or those areas that concern your contractor.
- If feasible, provide hard copies of the contents of the data sets or file they will be using and a map to demonstrate the relationship between the files.
- Invite them to lunch or have someone available to take them to lunch. This may seem like a trivial task but there is nothing worse for a contractor to be made to feel like a 'contractor'. It also helps to integrate them into the team.
4) Detailed description.

- Provide a hard copy, detailed description of the assignment. This work plan should include time frames, rules to be followed when accessing and processing data as well as quirks in the database to be aware of.

5) Programming Standards

- Before the contractor begins work, make sure they have a copy and understand your company's Programming Standards.

6) Check progress at regular intervals

- If progress is not as expected discuss this with your contractor straight away and find out why this has happened. If it looks likely that the assignment will overrun through no fault of the contractor, reschedule the time plan. Remember always have a deadline to work to. If however the overrun is due to the contractor then discuss the problems and work out an appropriate course of action. Don't just apportion blame!

7) Completion Check

At the end of the contract or assignment you should check the following:

- All work has been completed.
- The final computer copies of programs, logs and output are stored in the correct area.
- All SAS programs are well documented and have descriptive headers.

THE CONTRACTOR

Background

It's 2.30pm and you are watching the latest episode of Neighbours. The phone rings and you are informed that a company is interested in your SAS expertise and are you available for an interview and potentially the contract. Of course you are! The company sends you some company details and the proposal of the contract. You are impressed. But now it is up to you to impress them. How?
1) Review the Proposal

- Review the proposal or the description of the work thoroughly and feel confident that you can complete the work efficiently and to a high standard.

2) Interview

- If you have any doubts about your ability, now is the time to mention this. Not at the end of the first week.

3) Be aware of company policies.

- Be aware and respect the company policies.
- Find out what hours you are expected to work.

4) Programming Standards

- Read the Programming Standards of the company and adhere to them. If they seem a little sparse, such as no mention of documentation, suggest this to your client. However, remember you are employed to do a specific task, not to investigate their management or working procedures.

5) Never Assume

- If you have any queries regarding procedures, the database or what you are supposed to be doing, ask! The last thing you want to do is to spend several weeks doing a project just to find out that you had been running general linear models rather than non-linear on the data. This not only causes major stress for you and the client but also loss of sleep as you try and rectify the situation.

6) Review

- Once the first part of your work is completed, invite the client to review it. This not only gives you confidence that what you are doing is correct and avoids the situation stated above, but also allows the client to see that you are fulfilling their requirements.
- If possible, have regular, short meetings with your client to discuss progress, points of issues etc..
7) Remain on schedule

- If the time allocated for sections of work seems a little ambitious and the specifications of the assignment has changed, discuss this with the client as soon as possible. Hopefully you will be able to come to a compromise.

8) Sign off

- Once the assignment has been completed, take time to show the client what you have done, where you have stored the programs, logs and outputs.

- Try to get confirmation from the client that you have fulfilled the requirements and that they are satisfied with the work you have completed. If the client is not satisfied, then ask how you can rectify the problem.

9) Professionalism

- Try and be professional with your approach. This normally instils confidence in your client.

- Do not use your contract as a learning ground unless the client has agreed to this. A contractor is called in to do a set task that the client is unable to do in a set time frame. This means the client wants minimal investment of time in you and assumes technical and preferably business knowledge. Hence do not enter a contract unless you are positive you are capable of doing the work.

10) Friendliness

- Try to be friendly and fit into the team, it can make the working environment a great deal better.
KEY AREAS OF CONSIDERATION FOR BOTH THE CLIENT AND THE CONTRACTOR!

INTERPERSONAL SKILLS

This seems to be a problem common to both client and contractor but seems to be more readily identified with the contractor. Tact seems to be a major sub-heading. Situations have occurred when the contractor has tried to press upon his/her point of view on his client in front of all his/her colleagues. This has a 2 way effect on the client. First of all the client feels belittled and secondly, will not be as supportive as he/she originally was. If the contractor feels strongly about something write it down (less emotional) and give it to the client for review.

LACK OF COMMITMENT

Once a contract has started the contractor has the responsibility of completing the assignment in the time specified. Leaving a contract mid-term means the client must then resume the search for another contractor and double the investment time to get the new contractor up and running.

TEST YOUR CODE ON REAL DATA

Testing your code only on test data may be the worst mistake you can make. Performance implications and lack of memory can be major factors when the code is run on 4 million records in comparison to 1000. It is possible that the program will crash due to lack of disk space or memory.

EMPLOY PEOPLE YOU KNOW ARE GOING TO BE ABLE TO PERFORM

No matter how desperate you are to find a SAS Contractor, only consider those people that have the relevant experience and expertise. There is no compensation for trying to invest limited time in a person, when after a week your thoughts are confirmed that this person really can not do the job.

TRY NOT TO OVERSELL YOURSELF

For example, if a contract for a SAS/statistician becomes available and you did a little statistics in University, the chances are that you really will not be able to cope.

PLAN IN ADVANCE

If you require SAS contractors try to start looking for them well in advance. Normally the supply and demand is in favour of the SAS Programmers. If you require a specific contractor, the more notice you give that contractor the more chance you have of him/her working for you.

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