



“The Client’s Guide to Working with a Consultant.” (from the eyes of a consultant)

Consultants represent a resource to prospective clients, bringing various talents to bear to solve a client’s perceived needs—it may be a question of manpower, timing, objectivity, but mostly, it’s about *expertise* (functional skill) and/or *experience* (industry knowledge). Ultimately, a large dose of trust forms the basis of an initial engagement and a positive result.

Finding the Right Consultant

Most people begin the search process by employing the standard tool -- word-of-mouth; asking either co-workers, fellow industry contacts, association sources, publications, etc., “who do you know?” or “who have you used?” hoping to reach a basic trust position without a lot of searching and qualifying. Let’s face it—it’s how we find doctors, mechanics, appliance repairmen, plumbers, and others. Sometimes it leads to a great relationship, at other times, maybe less so.

- The ultimate qualifier—“would you recommend _____ ?”

In some cases clients look to the internet where the challenge, quite frankly, may be separating the screen image and buzz from actual substance.

In either case, an initial conversation --- “this is how I see my problem...can you relate, is this what you do?” --- should lead to you hearing at least the right questions from a consultant, and setting the stage for a meeting to further define and explore your problem. Don’t shy away from touching upon costs even at this stage —a common perspective should exist prior to a more detailed discussion.

As a consultant, we’re excited to hear from a possible new client—we want your business, now and in the future. In fact, we want to do the type of job that will result in you calling ONLY us in the future. So we’re open to all questions, like any other job interview.

The First Meeting

What should you hear from a consultant in a first meeting?

- A concise capabilities presentation-verbally or a standup.
- A client list and perhaps descriptions of past work that is germane to the client’s problem.
- A past report that a client has cleared for the promotional purposes of the consultant is extremely helpful—it moves the “sounds good” level of interaction to something you can see and touch that represents a deliverable.
- Referrals should be readily at hand—3 recent clients is a reasonable request.

Much of the same information should be available on the consultant's website.

- *Regarding experience...We believe the ethical position is to discuss projects in the context of industry or product or intent but not to "connect" these efforts to a specific client on a client list. Clients recognize that if you freely discuss what you have just completed for Company X, you'll be discussing their business with someone else.*
- *We also believe that a 2 year timeframe is appropriate for any interaction with a client's competition on the same subject.*
- *Furthermore, any identification of the client during the assignment is the client's call. There are good reasons pro and con to remain anonymous.*

These types of ethical tenets are recognized by consultants associated with the Institute of Management Consultants (IMC) and they just make common sense. All a consultant can sell is trust and credibility.

Defining an Engagement and Getting to a Proposal

The proposal is a key document in defining a mutual understanding of the client's problem, how the consultant will address it, and what form the results will take. The emphasis here is on mutual.

If it's a team project, have the team available. Are there decision-makers beyond the initial contact or team? What are their roles?

- At times there is an "internal" selling job after a proposal meeting; how can we help address that, whether it's up or down the organization? Every client has varied attitudes regarding outside consultants.

The more input the client can supply, the more likely any program will be a satisfactory experience for both parties. Clients may develop an RFP if soliciting several proposals. These can be helpful in generating a meaningful discussion but just writing a proposal from an RFP is unlikely to hit the mark.

- Clients that volunteer a weak outline of the issues; or offer limited thinking can generate a difficult and many times disappointing experience for both parties.

This discussion is the consultant's opportunity to demonstrate his/her expertise-not only grasping your problem but reacting to your thinking with additional points of view. Comments and questions should be an open discussion. We believe a key question is-"if you had all the answers today, what would you do?" This elicits some dialogue as to the importance of the program as well as its meaning in the company's overall planning efforts.

- Sift and sort the "want to know", "need to know", and "must know" issues.

An experienced consultant can react to this dialogue by suggesting, at least in a preliminary form, a program outline: actions/steps and alternatives that can address the client's problems and issues; in essence, a verbal pre-proposal. There are always alternatives to solving most problems but a consultant should be able to

say—"this is what you should do, this represents the best value" and of course, WHY. In the ideal case, the level of understanding and mutual dialogue results in an engagement that not only delivers meaningful results, but has been fruitful for both parties.

Additional parts of this proposal-development dialogue are time and cost parameters. While still in concept, an experienced consultant should at least be able to express a likely range of cost and time required. The cost should meet mutual expectations, reaching a more refined view because of meeting and discussing; ending in both parties comfortable with what the written proposal will state.

- Clients should understand what exactly is in the costs quoted—if a total cost, what is professional fees vs expenses; what expenses are anticipated and how are they accounted for. Might these vary? How is that decided? What if things change and how are cost variations addresses?

Beware the consultants who say—"We only do projects starting at \$XX,000." There's a level of inflexibility in that approach that probably impacts other aspects of the work.

Billing should be straight-forward. The final invoice should always be submitted after the program is completed so that any loose ends are completed to everyone's satisfaction. A word about billing...from the time the program starts we are working for you, like your employees we expect to be paid promptly. (Like clients, we hate chasing invoices).

- Do clients who pay well get extra effort-what do you think?

Signing Off and Conducting an Assignment

With all the preliminaries out of the way and a written proposal approved; the real work begins. Generally the program will start with a kickoff meeting to concur on objectives, issues, and other program details.

- Any internal information, not discussed previously, that may increase the program's efficiency should be shared.
- Anything that avoids duplication of information results in more quality time devoted to the program.
- It's also important that any data to be developed is in the expected format – for example, are markets described in units or dollars? This sounds simple and should be.
- Critical quantitative markets or targets should be defined

In our types of market driven assignments, we are focusing on field sources; while we have defined issues and probably a list of specific questions, are there any other tangential questions that would be of interest to the client.

- In other words put the burden on us regarding what's too much in the context of resources and objectives.

Progress Reporting and Discussing

Some programs may incorporate a scheduled progress report or two. This is beneficial to any program, so that client and consultant remain in sync in their thinking. But there are some common traps here:

- The client who ends the kickoff meeting by saying. "I want to hear from you every Friday" which freely translates into we are either doing to be over-budget or something gets shorted.
- We have no problem doing these types of contacts:
 - Assuming they are planned for-even an informal weekly meeting requires prep time.
 - Meaningful results are discussed-conclusions and real findings vs. anecdotes.
 - They add to the program's overall value.

Program Completion and Deliverables

As all efforts are completed, a final report document usually in presentation form should be the basis for a wrap discussion meeting. It's in this session that the consultant will present what should be a logical review of issues and objectives; in essence, the answers.

- Analysis, facts, judgments and models should be fair game.
- Results, the story, should be easily understood; a consultant who has to explain every page or chart is not serving you well.
- In the best presentations the client sees exactly where things are going and can sense what's on the next page. The Un-surprise.

It's at this point that the client should take advantage of the experience the program has given the consultant. What's between the lines here? Are there some nuances moving forward that will change thinking? Based upon the fact that doing this type of program is our business—what are our impression of buyers, channels, competitors, etc.

Perhaps recommendations are not part of the objectives but most efforts arrive at an overall end point or the SO WHAT factor. After it all comes together, what are the real decisions for the client?

- A more un-satisfying experience is a client who has engaged in a meaningful project but wants the presentation crammed into a short timeframe. This is an investment by two parties-get the most out of it.

Wrap-up and Post-Discussion

After all the dust settles and the report has had further review internally; any need for clarification or further explanation should be addressed by both parties. This should be a part of any engagement.

Lastly, how'd we do? Please give us a critique. Then, let's move on to the next one.