Book The IT Consultant

A Commonsense Framework for Managing the Client Relationship

Rick Freedman
Jossey-Bass, 2000

Recommendation

Author Rick Freedman spent many years as a consultant and his textbook and accompanying CD offer a lot of orderly advice aimed at both the novice consultant and the veteran consultant who wants to improve. Freedman covers such topics as the business of advice, the IT (information technology) consulting framework and developing superior consulting skills. Freedman's main argument is that consultants should train so that they can be of more help to their clients. Successful consultants, he maintains, rely more on their people skills than on their technical gifts. Freedman also gives aspiring consultants advice on how to remain competitive in securing and keeping clients. He instructs consultants to read a steady stream of periodicals and books to keep up with the vast daily changes in technology. *BooksInShort* suggests that you can use his book and CD set to find out everything you ever wanted to know about consulting - including how hard it is - but never knew who to ask.

Take-Aways

- Consulting has more to do with people skills than tech knowledge.
- To excel as an information technology (IT) consultant, you have to understand the client.
- One of the main questions a consultant has to ask is "Who is my client?"
- Consultants should always work on keeping the client focused on value, not price.
- Mature consultants leave their tech bias out of their equations.
- Consultants must be diplomatic to clients.
- The IT consultant has to be prepared for a variety of problems and pitfalls.
- Consultants have to clearly define what it is they do and will do for the client.
- The client should never determine what the consultant should do.
- Consultants should learn everything possible about business theory and practices.

Summary

The Consulting Profession

Consulting is more of an advisory skill than a technical one. Successful consultants are more than just technicians; they have to have the necessary people skills to communicate to clients what they need. Further, consultants have to know their clients so well that they know just how to talk to them.

> "Even that bastion of command and control, the U.S. Marine Corps, is refocusing its leadership programs on consultative management."

Consulting is more than knowing technology. There are plenty of technicians who can design and implement the most complex multi-site data networks, yet lack basic skills in communication, project management, time management or human interaction. Clients demand technical people who have those additional communication skills and moreover, they want somebody that they can trust. Hence, you need to focus first on the general principles of providing consultation and advice, rather than technical expertise, which should be a given.

The Business of Advice

Five concepts can serve as the foundation for the information technology advisory process. These concepts are:

1. Focus on the relationship - You must know the client as a human being and understand the culture, motivations, history, fears and goals of both the client and the organization. This is one of the most difficult tasks in consulting. Your success in this task has more impact on how well your job will go than any technical discipline involved.
2. Clearly define your role - You and the client should both clearly understand what you are expected to do and accomplish. Define what the client is expected to do as well as the boundaries of the relationship.
3. Visualize success - As a consultant, you have to give the client a visual picture of what success looks like. Otherwise, you may be faced with dreaded scope creep, where the engagement never concludes because the expectations keep changing. You and your clients should both be aiming for a non-ambiguous, complete goal.
4. You advise, they decide - Don't fall in love with particular solutions or approaches. Keep your emotional attachments toward, say, Linux or Open Source, limited. Clients are always in a better position to know the practical solutions that work for their own corporate environment.
5. Be oriented toward results - Consulting is more than advising: It is assisting clients to reach a goal. You have to keep the client steered toward the possible.

The IT Consulting Skill Set

Why do some consultants meet their goals while others struggle? Why will some clients put off projects until their consultants are ready to help them?

> "There is no more customer-intimate business relationship than consulting. To excel in our profession, we must gain our clients' trust. Like doctors or lawyers, we must help our clients feel comfortable enough to confide in us, to tell us things that may not be easy to acknowledge or discuss."

The answer has to do with the characteristics of successful consultants, who have skills you can learn. The key skills that consultants employ are advisory skills, technical skills, business skills and communications skills.

Technical skills are comprised of the knowledge you have if you are a professional in the field in which you have chosen to consult. In the real world of commercial consulting, it's critical to remember that clients become more sophisticated all the time, and they expect their highly paid consultants to be at least one step ahead of them. About five years ago, knowing how to connect a PC and a printer was enough to get you a gig as a consultant. Now, I frequently walk into client's offices and find technical teams that could rebuild the Internet from scratch.

"IT consulting is most successful when advisory skills, rather than purely technical ones, are stressed."

Many technical people don't realize how business works, but to join the field successfully, you'll have to learn about business. Consultants should know their client company's mission, its competitive strategy, its sales and profitability, its key clients and its history. Communications is consulting and consulting can be taught by practice.

Best IT Framework

The term "framework" is used consciously to suggest an approach to the IT advisory relationship. Generally, the framework includes approaching the client, negotiating the relationship, visualizing success, understanding the client's situation, designing solution options, collaborating to select solutions and delivering business results.

> "It is a proverb among salespeople that you must keep the customer focused on the value rather than on the cost. This is equally true for the consultant, where the client is buying service, an intangible, rather than, say, a piece of hardware that can be touched. Consultant fees are high, in many cases substantially more per hour than the client is paid."

This framework is an overlay of techniques and concepts with which to approach the client relationship. This gives you a managerial structure, since engagements that include implementation of IT systems will likely require a disciplined project-management methodology.

How to Approach the Client

Clients approach consultants for a number of reasons: They may lack the technical skills to solve their problems without outside help or the business experience to apply the tech knowledge they do have. Clients lack confidence in their ability to judge and balance options. And sometimes clients can't convince their management team that a particular solution is needed, so they reach for outside verification.

How to Negotiate the Client Relationship

Remember these six key points when working with clients:

1. Avoid imposing your role - Don't unilaterally tell the client what to do. Start with an open mind and with the position that everything is on the table. Afterward, work out those elements you believe are not in the best interests of the engagement.
2. Avoid having a role imposed on you - Firmness in steering the client toward reasonable roles and expectations is not only best for you, but it's in your mutual best interest.
3. Take out the emotion and the ego - Focus on the best interests of the client and don't look at the consulting relationship as one that you must win.
4. Negotiate creatively - Use whatever approach it takes to reach a goal. You could even let the client try-before-they-buy in order to close the deal.
5. Table disagreements - Don't turn negotiation into an argument. Move disagreements onto the back burner and work to re-think the issue to everyone's advantage.
6. Document your agreements - Take notes. Nothing is final until the agreement is initialed, reviewed and documented.

> "I'm always amazed at the number of 'consultants' who never read any trade publications; this is unacceptable on my consulting teams. It is our professional responsibility to remain informed on the developments in our field."

Visualize the success of the relationship. To foster this success, consultants should help clients create a mission statement, build project sponsorship teams and make sure information cascades down throughout the client's entire organization.

Understand the Clients

To understand your clients and their situation, you first have to understand certain aspects of their enterprise. You need to learn:

- What is the technology infrastructure? - Does the client use a WAP or an IBM mainframe with many nodes?

- How is data moved through the network? - And, how fast does it move?
- What kind of apps is the client using? - Do they have an open source Linux or Novell or Windows NT?
- What process is being used? - For example, does the client use some kind of Enterprise Resource Program?
- Gain some understanding of the client's business - Understand the company's strategic vision and learn about its business model.

Designing Solutions and Finding Options

Creativity can be learned through process and training. Industry is actually using creative design techniques to reach solutions to different dilemmas, and the techniques are very effective. Generally, a consultant's solutions should solve the problem, fit the client's requirements, be understood and be proven. The core solution design process includes:

- Brainstorming - This group technique encourages the generation of many ideas.
- Prototyping - Design a rough model.
- The "Cannonball Run" - A competitive rapid design process in which teams work against each other to develop a solution.

Presenting Your Solution

Your solution presentation must accomplish a number of goals. Primarily, you will restate the basic problem you've been asked to address and then you'll explain how you are going to address it. Having the right audience for your presentation is critical, so that you can help your client reach a consensus. At your presentation, introduce all your team members and allow the client's team to be introduced.

> "Diplomacy can be in short supply for many IT consultants. I've been in countless situations in which an IT consultant either implied or stated outright: 'The person who designed the current system was a moron'."

Quickly recap your role in the engagement, restate the limitations of the problem you're addressing, present a vision statement, state the benefits of each option you propose, present a budget and a timeline for what you propose and describe the risks and sacrifices of each option. Avoid technical jargon, avoid making recommendations, work with your client to review the options, don't push and be ready to make changes.

Define Project Acceptance Clearly

The client must know when the job is complete. This is not only for client satisfaction, but also for legal reasons. The consultant must define acceptance criteria up-front. Clear destinations make for clearer journeys. Further, you should negotiate an end point for your involvement. It's critical for you and your staff to know when your involvement is over. Acceptance can be phased.

> "Maturity as an IT consultant also means leaving our technical biases out of the mix."

Make sure that you document what you deliver. The acceptance document should describe project objectives, outline the deliverables that have been transferred to the client and note any continuing responsibilities, such as warranty duties.

How to Improve and Maintain Your Skills

You should view IT consulting as a profession on a par with engineering and architecture. One requirement for such a high level of skill is continuing education. Tech skill becomes obsolete at a blinding pace. As a consultant, you have to keep up with tech developments and understanding. First, you must keep up with trade publications such as PC Magazine or Computer World. Reading such publications is your professional responsibility. The professional consultant should also seek additional vendor training if necessary. Tech consultants tend to get formal training as either Microsoft or Novell specialists. Consultants should also use the Internet, team reviews and technical mentoring to stay current. You will be pleased to discover how fulfilling it is when your tech expertise really helps your client.

About the Author

Rick Freedman is the founder of Consulting Strategies, Inc., an IT training and consulting firm. He has 16 years of experience as an IT consultant, both as an employee of Fortune 500 firms such as Citicorp and Dun and Bradstreet, and as a principal consultant for Cap Gemini American and ENTEX Information Services.