Getting Clear on Clients' Expectations of Consultants
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For Boutique Consultancies And Solo Consultants
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Dynamic Innovations Squad
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Blog entry

When it comes to performance, the town of Grantham in Lincolnshire, UK, is certainly one of the most winning towns with its two phenomenal wins in the history of mankind.

First, in 1925, it produced the then future and now former British Prime Minister, the late Margaret Thatcher, undisputed world-class expert at handbag-wielding and one of the world’s feistiest politicians.

The second, and even fierier, claim to fame for Grantham is the Infinity chilli that took the world by storm in 2010.

**The World's Hottest Chilli Grown In Grantham**

Nick Woods of Fire Foods, a former RAF pilot, grew it in his greenhouse, and the new Infinity chilli weighed in at 1,067,286 million Scoville Heat Units, commanding the record holder Bhut Jolokia of India to the second place.

But the Infinity’s success was rather short-lived.

Within two weeks, Gerald Fowler of The Chilli Pepper Company (Cark, Cumbria, UK) created the Naga Viper, at 1,382,118 Scoville Heat Units, which pushed the Infinity aside.

Then came the Trinidad Moruga Scorpion from Moruga, Trinidad and Tobago at just under 2 million Scoville Heat Units.

But that record was short-lived too.

Then came Ed Currie of PuckerButt Pepper Company’s masterpiece from Fort Mill, South Carolina, United States, the Carolina Reaper at over 2,200,000 Scoville Heat Units.

By comparison, Jalapeño chilli weighs in at a “pathetically” light weight of 3,500-10,000 Scoville Heat Units and the Habanero chilli at a “laughably” middle weight of 100-350,000 Scoville Heat Units.

Disclaimer: In spite of using “pathetically” and “laughably”, even the tiniest amount of Jalapeño or Habanero would kill me before I could say Jemima Puddle Duck.

So, as you can see, the chilli industry is all about the pursuit of performance in the form of higher Scoville unit values.

It seems that whether or not people can eat it is not even relevant any more.

And the sad reality is that this is something that we can see in the consulting industry too.

 Quite often consultants offer solutions that client can’t implement anyway, and clients expect solutions from consultants without thinking of implementation.

But we know from the world of warfare, that a strategy, a concept that originates from the military, is just as good as it can be successfully implemented at a tactical level.

It’s implemented strategy that becomes improved performance.

But very often, strategic advice is dispensed by people who’ve never done implementation, so many pieces of that advice can’t be implemented.
Building a great submarine regiment may be a great strategy on the surface, but if it’s done in Chad’s army, then we have a problem. Chad doesn’t have even one inch of shoreline. Yes, it has the Chad Lake, but with its mean depth of 1.5 metres and shore length of 650 km, it’s a tad too small for a submarine regiment.

Some consulting clients believe that client-consultant relationship is a do-it-FOR-me relationship, so while the consultant works to earn his money, the client can go sailing, skiing or playing golf, and by the time he returns, the consultant has built him a blazingly profitable business.

And very often, clients ask consultants to build the proverbial submarine army in a country with no sea but with a possible air raid.

And when consultants tell clients that it would be the wrong approach, clients often fire consultants for telling the truth.

**Consulting Is A “Do It WITH Me” Not A “Do It FOR Me” Game**

“Consulting is like lovemaking. People do it WITH their partners, not FOR- , AT- or TO them.” ~ Yours Truly

In consulting, clients and consultants jointly create something new out of thin air.

When clients hire consultants, they hire brains with different perspectives to think WITH clients and this combined smarts will eventually result in the optimum solutions to solve clients’ problems or help them to seize new opportunities.

Doing something FOR clients is not consulting; it’s outsourced labour.

Also, performance has a lot to do with who you are, that is, it is more of a mindset than the performing of a sequence of tasks.

Performance is about energy, excellence, commitment, caring, the courage to say “I don’t know that” and other factors.

And most consultants have all these attributes and consistently work on improving them.

But sometimes consultants engage with clients who want them as outsourced labourers.

Clients tell consultants what they want, and they expect consultants, like good dancing monkeys, to do as commanded.

But the main problem often lies with some clients’ performance because they fail to do their ends of the engagements.

This is why we have to "manage" clients’ expectations. Manage may sound like a manipulative word, but I don't have anything better right now.

Maybe facilitate. It’s less rigid than managing something. Facilitation also includes the fact that we’re dealing with human beings.

Either way, we have to let clients know that we can train, advise, equip and assist their people to achieve certain goals, but we can’t do it FOR them.
I discovered many years ago when I was still doing personal training, that no amount of training that I did made my clients stronger and healthier. They had to do the work. Consulting is the same.

There are so many clients out there who have no idea how to work with consultants. What makes the situation worse is the dozens of books on the topic of managing consultants. Most of those books essentially recommend making consultants do the work. If it all works out, take credit for it, but whatever fails, blame the consultants for it.

One huge Titanic-ripping red flag is when the prospect asks the consultant...

“**So, what can you do FOR me?**”

This phrase alone indicates that the buyer either regards the consultant as an outsourced labourer (just like an employee minus all the benefits) or is not familiar with the way consulting works. So, let’s list here what we can do proactively to manage clients’ expectations. Remember, to meet clients’ satisfaction we must exceed their expectations, but unless we have a clear baseline for those expectations, they are impossible even to reach, let alone to exceed.

### What Do You Need to do to Manage Expectations?

#### Be Clear With Time Frames

Imagine you finish the project on time. What does “on time” exactly mean to you and your clients? Are you on the same wavelength? If your “on time” is next week but your client’s “on time” is tomorrow, then there is a problem. If you are late just by one day, the client’s expectation is ruined. You think you are days ahead, but failed to meet the client’s expectation. And many of those expectations can be less than obvious.

Give yourself time to complete your projects without stressing yourself and your people. Yes, there are urgent things, but they call for “urgent” fees and the revision of time frames. Remember your people have signed up for tough, mentally challenging work, but not for rough and stressing work.

#### Be Clear About Your Purpose Of Being In Business

There are two distinct choices here: Either short-term money grabbing by all means or building long-term relationships to improve the client’s condition and to create wealth for yourself by assisting your clients to create wealth for themselves.

Using sports language, if your eyes are on the scoreboard, you will drop the ball rather sooner than later, and regardless how hard you stare at the scoreboard, your score will go down. However, if you focus on playing the best game of your life, totally love what you do and truly care about the people you do it with – both colleagues and clients – the scoreboard will take care.
of itself.
You can’t control the scoreboard, but you can certainly control the game you play.

**Be Clear With Your Agreements**

Document everything. Yes, there are people we can do business with on a handshake – ideally each client, but we all need the clarity of documentation.
And documentation is not for protecting your arse, but rather having a written piece to which both you and your client are accountable.
Clearly spell out what you do and what they MUST do in order for the project to succeed. Lay down time frames and activities that lead to the accomplishment of the jointly developed objectives.

**Be Clear With Consequences**

There is a good chance that you will stick to your agreements, since your money depends on it. After all, the client may invoke your guarantee if you mess things up.
But what if the client says halfway through: “I’m too busy to carry on working with you, so just finish everything for me and leave me alone”.
Could you create a Riot Act in your agreement that spells out what happens to clients if they don’t “show up” at their ends of the agreement? I think you can.
It is not the client’s birthright, but the client’s responsibility to successfully complete the project. You are responsible for your end of the project, but as the ultimate decision maker, the client is accountable for the whole project.
You may even consider including a RACI matrix in your agreement that clearly shows who is responsible for what. It takes a little extra work, but clears up ambiguities.

**Be Clear With Excuses**

If something goes wrong, as it does every now and then, just tell the client and move on.
Tell him what’s gone wrong, how you want to correct it and move on.
The main point here is that you communicate clearly to the client what happened and make a new commitment to do it right.

**Be Clear On Promises From Clients**

It takes two to tango. If your partner sits down, you will work too hard but still look funny to be alone on the dance floor. You have to hold each other accountable. If you notice that clients don’t hold up to their ends of the agreement, confront them openly and explain they are slowing down their own progress.

**Be Clear On Your Concerns**
If the project starts off on the wrong foot (client’s lack of commitment, wasted time, late from meetings, being unprepared), then you have to discuss that because it can escalate into serious problems during the implementation process.

Make sure your voice is not blaming, just stating the facts and your feelings about those facts. Say everything from your standpoint. For example: “I feel frustrated when this [fact] happens, and if it happens again, I have no option but to end the engagement.”

If they discontinue the project, they save you from a lot of aggravation. If they continue, they will be more attentive in the future. Stipulate payments for this event. Will you refund their money or not?

Now let's look at the other part of performance, where we discuss how to set up projects in such a way right from the beginning that clients are fully involved, so they feel the weight of accountability and realise the end result depends on them.

If we consider that clients have the right to say the final word, it also means they are fully accountable for the success of the project. Yes, we are responsible for fulfilling our ends of the gig, but on the final analysis clients call the shots.

Therefore it is important to maintain shared responsibility all along the way. So, in the next 12 steps we take a close look at how we can plan and orchestrate our clients’ involvement in projects.

We can split hair over accountability and responsibility, and I differentiate because if you ever decide to use a RACI matrix in your work, the RACI lingo is that your are responsible for your end of the equation and the buyer is both responsible for his end of the deal and accountable for the overall success of the project. Please emphasise this in all your engagements.

**Step 1. Defining The Problem And Long-Term Consequences**

Ask clients what they think the problem is but always dig deeper. There is a very good chance that what clients tell you is just mere symptoms. Low sales is hardly ever caused by lack of sales skills.

It is more likely caused by low self-esteem, insufficient interpersonal skills. It is more related to who the person is than what the person does. 80% of a firm’s limitation lies in their people, that is, in who they are and not what they do.

In order to have the right things, we must do the right things, and to do the right things we must be the right people. It has everything to do with our perspectives. Possible request from the client can be...

“Joyce, you say the problem is low sales, but I see a high level of turnover among sales staff. I think, you and I should investigate the reason why they are leaving so quickly after being brought on board.”

**Step 2. Defining Learning Objectives**

One of the objectives of every single consulting gig is the sharing of knowledge with clients.
That is, teaching clients how to fish, instead of just giving them a fish over and over again.

It’s important that we empower and enable our clients, so next time they can solve their problems without our assistance, although, they are likely to call us for a quick fine-tuning or feedback.

However, clients can only learn what they expect to learn, so it’s our job to make clients clearly define what they want to learn. Possible request from the client can be...

“Jack, whatever we do together during this project, I want you to be able to do it on your own the next time. How can we create the most effective learning environment for you, so you have the best chance to maintain the realised improvements, and if the problem comes up again, you can solve it for yourself?”

**Step 3. Deciding To Do The Project**

This is the starting point of the project, that is, the preparation for recommendations. At this point you and your client decide that the problem is serious enough to warrant your intervention, be it a study, a report, a focus group, etc. Possible request from the client can be...

“Jodie, we have established that due to high sales talent turnover you are falling further behind your annual sales projections. Your idea is to run a sales education programme, but I believe people leave because corporate culture is not inviting enough for them to stay. Instead of a sales program, I prefer to take a closer look at your corporate culture to reduce and/or eliminate those hostile factors that make people leave so soon. What do you think about this approach?”

**Step 4. Defining The Project’s Scope**

Based on your intuition, past experiences, education, etc., that is, process skills, you know what aspects of the problems to study. Your clients, based on their content knowledge, will know how to blend your processes into their contents. Possible request from the client can be...

“Jim, this is the point where we blend our individual skills and define the details of the project. I require your full participation, so we can produce measurable results within three months the latest.”

**Step 5. Deciding Who Will Be Involved**

This is a serious point because if you mismanage things here, you can easily become an outsourced labourer, not a consultant. Remember this: Clients want you to do the whole project hook, line and sinker and hand it all over on a silver platter.

They also want you to create as little interruption in their busy schedules as possible. This is the time to create a client-consultant project team, so you can start sharing responsibilities.

Yes, it is always easier to do everything ourselves, but we must consider the client’s learning and full involvement if we expect full commitment. In the worst case, if the client insists on your doing everything, which is often the sign of low level commitment, you can just walk away from...
the gig. Although if you set value-based fees, and get paid in advance, you hardly ever have to worry about this issue.

Also, the more you involve the client’s people and the more you rely on them, the more committed they become to the implementation of the recommendations. Possible request from the client can be...

“Joanne, let’s finalise who is on the implementation team, their roles and accountabilities. If we do it now and document it, it will make the project run smoother and more quickly.”

Step 6. Defining Tasks And Methods

This is a discussion over how to do the initial part of the project, how to start working on putting together the recommendations. What shape will the recommendation take? Will it be a report, how big and how detailed will it be. Will it be an educational program, workshop, seminar, focus groups, etc.

What exactly must be collected in order to compile pragmatic recommendations. You are also teaching the client how to do this stage the next time without your involvement. Possible request from the client can be...

“James, having defined the project’s objectives, let’s assign the appropriate tasks to the appropriate team members. Also, let’s set up the right communication channels among members, so everyone knows who to interact with and how.”

Step 7. Collecting Data

Here you and the client are moving into collecting the appropriate data for the project. Again, make certain that you do part of the work and the client does the other part.

There are two snags here: 1) People in the organisation may withhold information from you because they perceive you as an intruder who came in to change the status quo. They also think you have some power over them. Both assumptions are incorrect.

You were invited to change the status quo, and you can’t have power over people unless they voluntarily give their own power away. That is a sign of low self-esteem and self-confidence. Many people do hand over their personal power and beg other people to domineer over them. 2) Some data offered to you may get distorted or totally off kilter because some people have too much vested interest in the status quo, and will do their best to prevent the organisation from changing. Possible request from the client can be...

“Janet, I want to reserve two of your junior managers to work with me, so we can interview people together and they will also learn how to facilitate focus groups and how to document the results. Also you will personally interview these five people. How do you feel about this engagement?”

Step 8. Funnelling And Summarising Data

Someone on the team must create a database into which data is collected. It is important that data
collection is set up in such a manner that the slightest chance of discrepancy is eliminated.
Possible request from the client can be...

“Jennifer, everyone will work in a cloud-based contact manager system set up in XYZ, so we all are on the same page. You are to get the program installed on each team member’s laptop computer, and distribute the instructions on how to synchronise the files. Then we will practise it a few times just to get it right.

**Step 9. Analysing Data**

This is the time to pull together all team members and analyse the findings. This is the point where many consultants think that clients’ lack of certain knowledge disqualifies them from analysing the data. Never mind clients’ level of knowledge. Request their commitment of being there and basically see what you do and the team are doing. Possible request from the client can be...

“Jay, although you have said that you are a computer layman, I want you to be at the data analysis meeting because you have high level of knowledge on how the company works and we need your contribution from a strategic angle.”

**Step 10. Conducting The Feedback Meeting**

Set up the feedback meeting in such a way that you present a bit and the client’s people present the majority of the findings. You are the unbiased outsider, but the client’s people know the details of operation. Possible request from the client can be...

“Jane, at this meeting Eric will present our findings on hardware, Erica will present on software and I will present on how your people relate to the existing system as a whole. I want you to record the meeting, listen to it a few times and get back to us if you have any questions. If you deem our findings to be valid, then based on that we can start developing our recommendations.”

**Step 11. Presenting Recommendations**

At this stage you and the client combine your process skills and the client’s content expertise. Possible request from the client can be...

“Jason, based on the feedback you received the other day, here are our recommendation for the new computer network. Again, Eric will make recommendations on hardware, Erica on software and I recommend some changes regarding how your people can use the system more effectively.”

**Step 12. Deciding What Actions To Take**

One crucial point where so many consulting projects fall flat on their arses is the implementation after you have made your recommendations. Clients often say, this is a good idea and they will think about it. Make sure right at the beginning that you are there when the “battle” starts. It is very hard or even impossible to fight a battle that is based on a general’s strategy but right
after the planning session the general was sent home and the captains take over. If necessary, stipulate in your agreements that you want to be involved in the implementation and you want to be posted on results. Possible request from the client can be...

"Janice, as we agreed at the beginning of this project, I want to be involved in the implementation process and see how improvements unfold, so I may be able to offer some guidance and ideas along the way. How do you feel about my involvement?"

Each of these steps engages the client in full collaboration, which also reduces resistance towards implementation and increases the guarantee for success. It also increases your value to the client, so the perceived investment in your services further shrinks in comparison to the magnitude of improvement you create. Be guided by this old saying: If clients could have done it, they would have already done it. But they have failed with their past attempts and that is why you are there. If you chicken out of the implementation process, clients are likely to get stuck in the same mud as before, and may even blame you for the mess. Remember, that is precisely the reason why many companies hire consultants.

The CEO is not going to blame his own retarded son-in-law, the marketing director...

"Let's hire a consultant. We are so screwed up that there is no way he can help us, but at least we can take out our frustration on someone and kick and sue the crap out of him without harming each other."

Most clients have lots of information and some knowledge about what to do. The problem is that it’s only information and a little knowledge. And they can become solid knowledge and wisdom once they are applied in the real world.

As British journalist, musician and broadcaster, Miles Kington, once put it...

"Knowledge is knowing that a tomato is a fruit, wisdom is not putting it in a fruit salad."

And all that information and that limited knowledge can do more harm than good to clients. We just have to point it out to them.

With victory on high...

Tom “Bald Dog” Varjan
http://www.di-squad.com/

Additional Knowledge Products to Build Your Consulting Firm

Here are some knowledge products on a broad range of areas as they apply to running a boutique consulting firms or solo consultancies. These products are sort of workbooks. They explain what is what, then walk you through the "how to..." part of the process. As you read the books, you do
the exercises, and by the time you finish reading, all the relevant bits and bobs are in front of you on paper applied to your own unique situation.
I hope you find them valuable.

**Consulting Retainer Engagement Toolkit:** A comprehensive home study programme on the ins and outs of setting up consulting retainer engagements in which your clients receive great value and you are compensated for the value you bring to your clients' tables by making your brainpower available to your clients. For details see [Consulting Retainer Engagement Toolkit](http://www.di-squad.com).

**It's All About Your Value: Consultants' Guide to Setting, Raising and Safeguarding Fees:**
How to price consulting engagements based on buyers' perception of the value the consultant brings to the table regardless of time, materials and other retarded but commonly used factors. This booklet covers a step-by-step process of establishing the value of your contribution and how to get paid for that value. For details see [It's All About Your Value](http://www.di-squad.com).

**Mastering the Consulting Proposal Process:** For many consultants proposal writing is a "hope-and-pray" game. They sit down with prospects, chat for a while and then volunteer to "submit a proposal" without knowing the full specifications of the intended project. But some, usually false, buyers are just collecting free information for in-house implementation. A proposal, just like a marriage certificate, is a short document, but it is silly to offer it unless the other party has already made a commitment to go ahead. This e-book walks you through the maze of developing your proposal and presenting it to buyers. [Mastering the Proposal Process](http://www.di-squad.com).

**Dynamic Duo Mentor Programme:** If you're a solo consultant, my Dynamic Duo Mentor Programme may be a solution for you to have access to a second opinion on both strategic and tactical issues you’re about to put into action. For details see [Dynamic Duo Mentor Programme](http://www.di-squad.com).