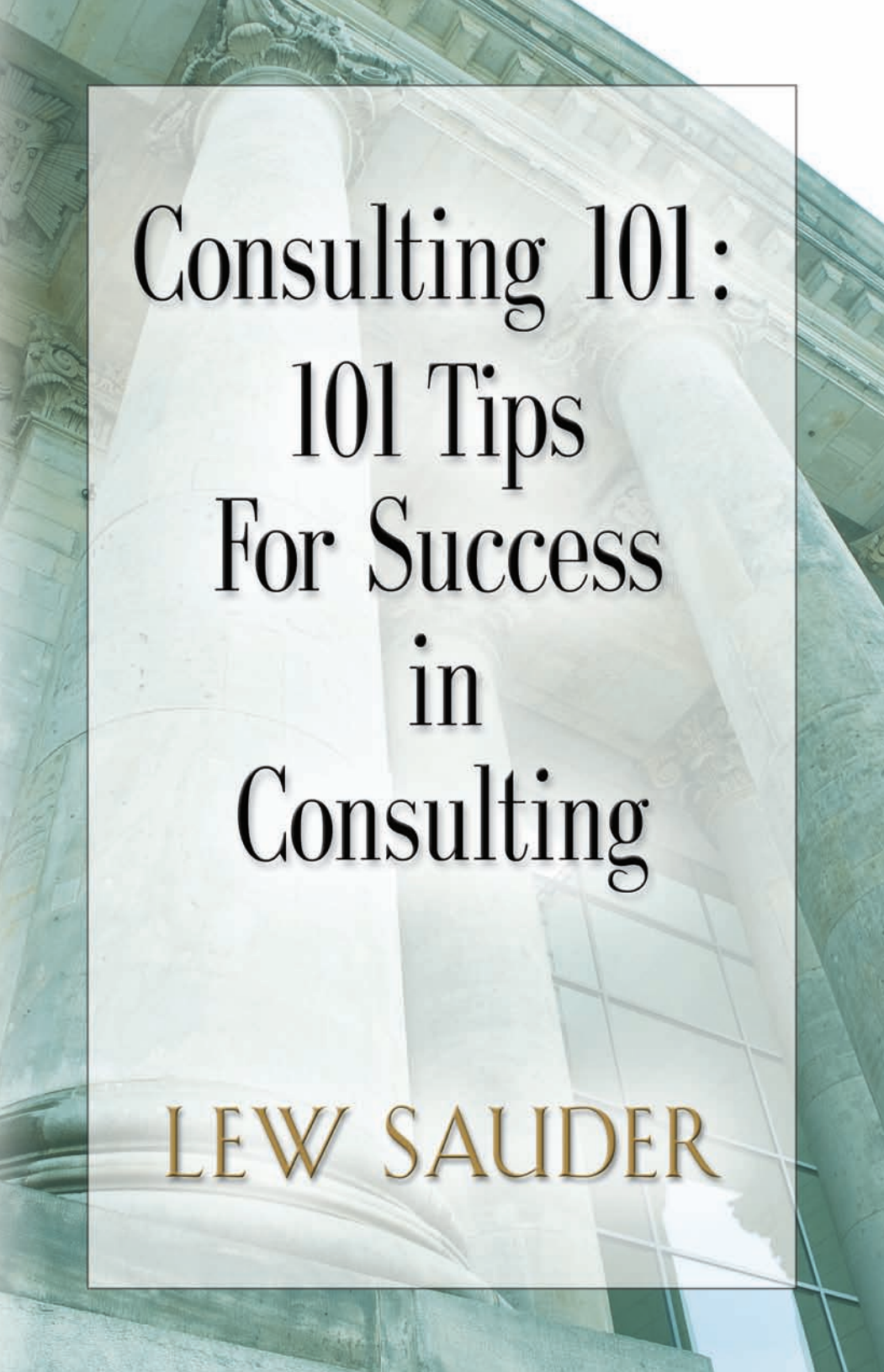Consulting firms hire bright people directly out of college or with industry experience to help their clients solve business problems. In addition to business knowledge, new consultants also need to know skills such as: - Client relationship management - Expectation Setting - Effective communication - Selling consulting services - Successful career management techniques Consulting 101 provides you with 101 useful tips to optimize your professional performance and jump-start your consulting career for success.

Consulting 101: 101 Tips For Success in Consulting

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Consulting 101: 101 Tips For Success in Consulting

LEW SAUDER

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Preface

Early in my consulting career the firm that I worked for asked me to drive three and a half hours from Chicago to Indianapolis to meet with a client. We were to discuss development of an imaging system. I had just recently been trained on the imaging package and had written only a few applications for one other client.

I walked into a conference room of about a half-dozen people and I was introduced as an *expert* in imaging systems. They said I was there to help them develop an imaging application to interface with their Accounts Payable system.

The inflated introduction was a bit intimidating–I knew even less about AP systems than imaging systems. It stroked my ego enough to try my best to live up to the label. I reached back into my memories of my training and my lone client experience. I started asking questions about their work flow. I took them through the who, what, where and when of their payment processing to understand their current process. I drew a diagram on the white board to regurgitate what they had just told me in a pictorial form and used another color to insert scanning stations to input invoices and purchase orders to the imaging system. Next I added terminals at key points to represent points in the process where users could view the images on-screen. It was a simple future-state design and they were thrilled with what the *expert* had done in one short meeting.

Most people dream of being an expert at something. Having an expertise in a specific area lends a combination of prestige, credibility and acceptance to one's branding. To be an expert in a specific area of business translates into being successful and in demand. Much like a homeowner might hire a plumber or building contractor for a home project, businesses turn to consultants as experts to provide advice and services for which they either don't have the expertise or the staffing to perform themselves.

Having a depth of knowledge in a subject matter, however, does not necessarily translate into success in the consulting world. In most cases, a successful consultant is a professional with a combination of many skills that provide value to their clients.

Ego enhancement is not a reason to pursue a career in consulting. Consulting is a demanding and competitive career that requires long hours, hard work and the ability to deal with difficult people. It is also a rewarding endeavor that pays above average and provides experience and opportunities that are not available in many other occupations.

In addition to some business or technical know-how, consulting requires a multitude of additional skills. You need to have the ability to think on your feet and utilize diplomacy for resolving conflict. A consultant must also balance being customer-centered while keeping the firm's interests at hand.

Throughout my career, as I moved into management positions in consulting, I've worked with many new employees. They were either "newbies" out of college or experienced workers who had never worked in consulting. I found it to be frustrating at times. Although they had the business and technical skills to do assigned tasks, they lacked

the softer skills that are so important to successful consulting. There was often a lack of awareness that the client was the paying customer and should be treated differently than a peer. They treated the project in a transactional approach, rather than establishing a relationship with the client to improve our chances of acquiring additional work. In meetings there were times where the consultants exposed some of the firm's dirty laundry to the client.

I'd meet with my peers over lunch and we would share war stories of how our consultants weren't provided proper training of the basic blocking and tackling skills. Those skills are critical because they help teach the professional behavior that every reputable consultant needs. That is why this book was created - to provide a primer to anyone who is considering joining a consulting firm, starting their own firm, or simply working as an independent consultant. Many of the tips include case studies of real world examples of mistakes I've witnessed over the years (some that I've made myself).

As I wrote this book, I started with a much larger list and pared it down to what I thought were the most important issues to address. Even then, I found a lot of the advice to be basic–almost common sense. If it's such common sense, then why did I see these tips violated nearly every day? Much of the advice in this book is guidance in professionalism that can–and should–be used by anyone joining the business world. In most companies, this is nice-to-have advice. In consulting, it is imperative business behavior for success. In order to establish credibility and legitimacy with a paying client, there are certain guidelines that must be followed.

One final note: I was once at a week-long firm outing in which spouses were invited. One evening a group of folks

ended up in the hotel's bar. One younger consultant who was a bit over-served was using foul language and cursing at every opportunity. Thankfully there were no clients present, but the wife of the firm's president was in the group.

The next morning at breakfast, a senior manager who had been with them in the bar pulled the young consultant aside and advised him about how inappropriate his language was in the presence of the president's wife. The hung-over consultant apologized saying it wouldn't happen again and thanked the manager for his advice. As they headed for their table, the president's wife came up to him and said, "There you are you son of a bitch, how are you feeling this morning?"

The moral of the story here is that not all advice applies in all situations. There are 101 pieces of advice in this book and not every one will fit for every client in every circumstance. At some point, your own good judgment should take over once you get acclimated to the firm you join and your assigned client.

Introduction: The Consulting Industry

Types of Consulting
Consulting is a broad term that covers a multitude of professional services. It runs the gamut from large, high-profile management consulting firms providing strategy consulting to Fortune 500 companies to an individual providing a temporary service to a sole proprietor. There are consultants for virtually every industry; healthcare, banking, retail, manufacturing, etc. All have industry specialists, and almost every industry has sub-industry specializations. For instance, in manufacturing, there are specialists in automobile, heavy equipment, food manufacturing, etc. There are also industry generalists who provide professional services to all industries in areas such as human resources, information technology and marketing.

The Tiers of Consulting
The consulting industry is often defined in terms of tiers based on size and industry influence.
- Top-tier consultants are considered the elite of the industry and usually specialize in Management and Strategy Consulting for all major industries. They have practices in many other areas including Information Technology and Human Resources. Top-tier firms include the likes of Boston Consulting Group, McKinsey & Co., Accenture, Ernst & Young and PricewaterhouseCoopers.
- Mid-tier consultants generally offer many of the same consulting services of the top-tier, but are smaller in scale, usually less than $1B in annual revenues. Mid-tier firms

often focus on mid-sized companies, but significant exceptions exist. Firms in this category include BDO Seidman, RSM McGladrey and Grant Thornton.

- Industry-specific firms focus on a specific industry such as manufacturing or healthcare. There are thousands of firms of all sizes in this category.
- Boutique consulting firms, also known as specialty consulting firms have a focus in a particular area such as information technology, human resources or marketing. This category also has many firms of various sizes.

Business organizations use Consultants for many purposes depending on their needs.

- **To bring in the experts:** Suppose a software company has identified a reduction in demand over the past 12 months. Their marketing strategy has not changed significantly over that period. They are wondering if there has been a major shift in public opinion of their product or possibly in consumer use of their software. They decide to bring in a Marketing Consulting firm to perform some market studies to determine what is causing the shift in demand and to help them develop a marketing plan to reverse the trend. Most companies already have marketing divisions to perform day-to-day marketing activities, but may not have the expertise to perform a high-level marketing strategy. This is similar to a person who hires an attorney for legal problems. A business organization hires a consultant to provide expert advice and counsel.

- **To perform a project:** A multi-location regional hospital would like to develop a new software application that will

allow them to track their accounts receivable from insurance companies. They contract with a consulting firm to meet with their internal subject matter experts to define the full set of requirements, develop the new system, implement it, provide training to their staff and support any issues with the application for some period of time.

- **Augment their staff temporarily:** A national retail company is developing a point of sale application that requires twenty programmers over a ten month period. They currently have ten programmers available on staff. Rather than permanently hire an additional ten programmers they will contract with a firm to bring in ten programmers to supplement their team for the duration of the project.

The focus of this book will be on larger solution-based firms and their structures, although much of the advice applies to consultants at any level in any tier of consulting.

Chapter 1 - Getting In

E very consulting firm has their own process for recruitment so it does little good to provide a specific recipe for a *How to* guide to get hired in your chosen firm. Consulting firms generally look for people with the following characteristics:

- **A consultant that can think on their feet**. Consultants are put in situations that require fast thinking and will not get flustered with difficult questions or confrontational situations. A firm wants to know that if you are in this situation you will not back down. At the same time, they want to ensure you won't respond confrontationally and potentially damage a client relationship.

- **Strong communication skills.** As odd as it sounds, many people I've interviewed – whether right out of college or with years of experience – have trouble speaking a complete sentence. A consultant needs to have the ability to speak and write succinctly to provide information to a client efficiently. This skill, within itself, helps instill confidence from the client that you know what you're talking about.

- **Leadership skills:** Firms may ask you about your past experiences when you were in a leadership role. They will look for situations when you took charge in a

group setting and influenced a group of people to accomplish an objective. They will look for your ability to make decisions under pressure.

- **Self-confidence:** Perhaps all of the above items imply a high level of self-confidence, but firms look for people who can speak and act confidently. Be careful not to come off as arrogant. They will recognize arrogance as a facade for a lack of confidence.
- **Subject matter knowledge.** Although consulting firms usually provide initial training to new hires, they want their recruits to have some knowledge that can be applied beginning with their first assignment. They are looking for college recruits with majors in practical knowledge, such as accounting, computer science, healthcare and engineering.

When recruiting experienced candidates, they are seeking education and experience that will allow them to make an immediate assignment on a client project.

Tip #1: Practice Situational Interviewing

Firms will ask questions during the recruiting process that will test you on the above criteria. There are entire books and Web sites on the specific questions that firms ask, depending on their consulting specialty. Be prepared for questions that test each of those skills. They may describe a challenging business situation or ethical challenge and ask you how you would address or resolve the issue. There may be an intense session asking technical questions or even a written test to assess your subject matter knowledge.

The recruiting process may involve many steps. There may be an initial contact with an external recruiter by e-mail, phone screen or at a job fair. This may be followed up by a phone interview, and an on-site visit. Lunches and/or dinners may also be involved. Throughout each of these points, the firm will be assessing your social and communication skills.

Investigate situational questions and practice with peers. Practice speaking with a confident tone. Take time to think things through rather than blurting out the first answer that comes to mind. Summarize the question back to them, asking questions to clarify details. This will allow you to understand the issue more clearly and give you time to organize your thoughts as you devise an answer.

Above all, stay calm. Getting flustered and nervous is a sure sign to a hiring firm that you aren't ready to face a client.

Tip #2: Focus on the Job, Not the Compensation

Case Study:
Chris was highly recruited out of college by many major management consulting firms. He had a 3.8 GPA and, as a member of the football team and president of his fraternity, he had a lot of team and leadership experience. As a result, he had his choice of firms with which to interview. The first two firms invited him to their offices for a full day of interviews, lunch with two vice presidents, and a dinner with the Sr. VP of Recruiting. They nearly fell over themselves praising him and did everything but present him with an offer. They touted their benefits, including their efforts to limit travel for their consultants. They emphasized that many of their consultants work from home when not assigned to a client project.

The third firm Chris interviewed with was his first choice. It was in the metropolitan area where he was from and had the best reputation in his specialty area of study. This firm's recruiting approach was to make the recruit understand their business. Their philosophy was that the more a candidate understood about their culture and business approach, the better he would be able to determine whether he would like working at their firm. As a result, they concentrated on giving Chris a "day in the life" overview in which he shadowed various people in the firm for different periods of time throughout the day.

At the end of the day, he met with a vice president for dinner. The purpose of this dinner was to assess Chris's impression of the firm. If he still had a favorable opinion, they

would move on to the next step of more in-depth interviews. Chris was impressed with the firm and still held them at the top of his list. He was disappointed that they hadn't shared any information on their salary or benefits. At dinner, he began asking the VP about the starting salary range for their recruits and whether there was much travel involved. He also wanted to know if they had work from home arrangements.

The VP was equally disappointed in the aspects of the job that Chris focused on. He would have been much more impressed if Chris had focused on the consulting business, typical projects that they manage and the culture within the firm. After conferring with the recruiting team the next day, they decided not to go to the next step in the interview process with Chris.

Three days later, Chris was shocked to receive a letter from the firm thanking him for his time and explaining that they had no positions that matched his qualifications.

Salary and benefits should not be discussed by the candidate during the interviewing process. Firms may tout some of their benefits as selling points, but it is best to maintain a game face. It is more impressive to the firm to show interest in the roles and responsibilities of the job and show that you are interested in their firm for the work rather than the compensation.

Once an offer is made, they have made a commitment to you. They will provide you with their salary offer and the full benefits package. This is the appropriate time to ask about specific benefits without risk of turning them away.

Tip #3: Business Travel Is Not the Same as Pleasure Travel

Case Study:
In an interview with a recruiting firm, Lauren went in with confidence and felt she was answering the interviewer's questions with ease. The interviewer was in her third year of consulting and described her experiences to Lauren. She had spent about two months in San Francisco and then four more in Denver. She wanted to know if Lauren would be able to work at a place that required this much travel.

Lauren explained that this sounded exciting. She loved travel. She had just gone to Florida with her boyfriend this past winter and they enjoyed going to different places and trying new restaurants. She went on to discuss the site-seeing they had done and how much she enjoys seeing new cities. The interviewer explained to her that business travel was quite different. She said that although you occasionally get out to see parts of a new city, most of the time is spent working at the client. There is not a lot of time left for sight-seeing.

In most consulting organizations, you generally go where the client is so travel is the norm. In the age of cost cutting, telecommuting and heightened airport security, firms have figured out ways to reduce travel, but it is still prevalent. When consultants do travel, they are usually expected to maximize as much value from it as possible. While out of town, they usually stay at a hotel close to the client and work until well into the

evening. Lunch and dinner at their desk is common and little of the new city is seen other than the airport, the hotel and the client site.

Showing an expectation of business travel being enjoyable and pleasant shows a naiveté of business travel that may prompt them to take a pass. A more appropriate response from Lauren might have been to explain that she is aware that there could be significant travel, and that it is not an issue. Then, asking the interviewer about the work she did at those clients would show that she is more focused on the work than the inconvenience of travel. This needs to be an honest statement. If you are unable or unwilling to travel, then it would be best to identify a consulting firm that focuses only on a local client base.

Tip #4: Sell Yourself

The resume is a tool to get you in the door for an interview, but the firm is hiring you, not your resume. When interviewing, it is important to sell yourself to the firm. A significant factor for success in consulting is the ability to sell a solution to a client. Supplement the information on your resume to show them your full value.

When a firm proposes on a project with a prospective client, it is much like a job interview. They describe their capabilities in the hope that the prospective client will hire the firm to work for them. A job interview is like an audition for proposing on a project. If you can't sell yourself, they may assume you also won't be able to sell a project.

When telling the interviewer about your past experience, focus less on the tasks that you completed and more on the benefit it produced. State benefit in measureable terms, if possible. For example, if you waited on tables to help pay for college expenses, provide the percentage or total dollars of college funding that you were able to contribute. Or, if you volunteered for a fundraising effort, rather than telling them how many hours you worked, describe the benefit in terms of dollars raised or saved for the organization.

Proving to the firm that you have both the technical skills to do the job and the ability to sell will give them a compelling reason for them to want you on their team.

Tip #5: Determine Why You Want to Be a Consultant

Before you waste a lot of your time and that of the recruiting consulting firm determine why consulting appeals to you. Some of the possible reasons include:

- You enjoy problem solving and believe consulting would be an exciting opportunity to develop deep experience in your chosen industry.
- You look forward to working with businesses to develop creative solutions to their problems.
- You like working in a project environment where many people come together to accomplish a common goal.
- You've always been a good leader and consulting is a great environment to apply your leadership skills.
- The variety of going from project to project and client to client is attractive to you.
- You are drawn by the challenge of working in a fast-paced, high-powered environment that demands you to do your best to succeed.

This is a question you will most likely be asked in an interview. There is no single correct answer. Of course, you have to back your statements up with facts. Be prepared to tell them about your experience in problem solving situations and what you liked about it. If you like to be challenged, tell them about specific times where you took on additional responsibilities in order to challenge yourself. Telling them what they want to hear without facts to back it up will fall flat.

There may be some selfish or personal reasons that you would like to pursue consulting. Such reasons as acquiring experience at a premier consulting firm in order to start your own firm or to get exposure to high-profile clients to obtain a job offer will not induce firms to hire you and may be an indication that consulting is not for you. Firms are looking for people who intend to be with them for the long term. If you are looking at consulting as a stepping stone your heart may not be in it. You will have a much lower chance of success as a result.

Chapter 2 – Client Relations

I n the professional services industry there is no tangible product that can be held by the customer. The firm may have proprietary processes and templates in an effort to brand their service offering, but their service providers – their consultants – are drawn from the same talent pool that their competitors draw from.

Sustainable strategic advantage is achieved by taking all of your resources and combining them in a unique way that adds value to your end-consumer. Firms do this by establishing their unique blend of service offerings, smart hiring and employing creative, ambitious individuals with extensive knowledge in these service areas. Then they train them to deliver it in a consistent manner.

Despite all of this effort, the most successful firms obtain business–and maintain it–through the relationships they develop with their clients. When a firm proposes for a new project, the client prospect will judge them on their perceived capabilities based on their discussions and the firm's past experience. When competing firms have comparable abilities, the decision often comes down to the firm with which the client feels they have developed a better working relationship.

Once a firm wins their first project at a client, their goal is to make them an annuity client and perform more services for them. The best way to do that is to provide excellent

service. In addition, the firm wants to continue to develop a relationship with the client. This comes about by teaching their consulting staff to fit in to the client's culture and treating the client and their employees with respect. It is always beneficial to take the time to get to know and understand the client and their staff.

Tip #6: Dress At or Above the Client's Standards

There was a time not too long ago when the suit and tie were standard attire in nearly any given business setting. It was easy for consultants to know how to dress at a client site. Today, dress codes at companies run the gamut from ultra-casual shorts and flip-flops to old school suits and ties. These are both extremes that are fairly rare. It is more common to find a company with a business casual dress code, requiring a collared shirt and clean pressed non-denim slacks for men. Attire for women is somewhat more flexible, but the standard rule for business casual is no jeans. Some companies lighten up the dress code for Fridays, where business casual rules for Monday through Thursday, but jeans are allowed on Friday.

Regardless of a company's dress code, and their adaptations of the rules depending on the day or season, they all have internal employees that push the envelope for what is acceptable.

A rule of thumb for a consultant to follow is to dress at, or slightly above, the company's defined dress code. If business casual is the standard, make sure to always wear a collared shirt, and pressed dress slacks or khakis. If jeans are acceptable at the client site, it is a much more professional look to wear something a little less casual. Some things to consider:

- Some clients want their consultants to blend in. If consultants wear suits when everyone else is wearing jeans, it portrays an air of elitism.

- Some consulting firms have strict rules against jeans – or denim of any kind – regardless of the client's dress code. It's best to be familiar with your firm's guidelines.
- Before making a visit to a client site, ask other members of the firm that have been on site for their recommendations on attire.
- When in doubt about what is acceptable, watch what the client's executives wear and follow their lead.
- If you are unsure and there is no one to give you a suggestion, wear a suit. If they have a more casual dress code, you can always take the jacket and tie off for the remainder of the day.

Tip #7: Consider Yourself an Outsider

Case Study

On her first day at the client site, Heather saw the posters on the hallway bulletin boards publicizing the company's annual employee cookout. It was to be held the following Friday in the company parking lot. There was going to be lots of good food, door prizes and employee recognition awards. She thought it would be a great opportunity for her to get to know her teammates in a more informal client setting.

When Friday rolled around she went down to the parking lot with the client employees and got in line for food. She sat with the employees that she had been working with over the previous week. They seemed polite, but a little uneasy with her presence. Each person who went through the line had been given a raffle ticket with a number. As they ate, the president of the company announced the numbers for door prizes. Finally, he called out the number that matched Heather's ticket. She went up to the stage area and found that she won an MP3 player. She was thrilled to actually win something and thought it was a generous prize. When she returned to her table, she was disappointed that her client teammates didn't share her happiness. She thought they were actually a little jealous.

On Monday morning, her account manager stopped by and asked to talk to her in the conference room. She explained to Heather that the client had raised an issue about her attendance at the company cookout on Friday. The purpose of the cookout was a morale boosting activity to thank their

employees for their dedication to the company. They didn't mean to be exclusionary of consultants, but it was intended for employees only. She explained that it put everyone involved in an awkward situation.

Heather was both embarrassed and ashamed. She hadn't thought about the purpose of the event and felt bad that she took a prize that should have gone to someone else. She apologized to the account manager, but the damage had been done. They both agreed that apologizing to anyone at the client would create more awkwardness. They marked it as a lesson learned and decided to move on.

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In addition to the standard benefit offerings of health insurance, retirement savings programs and vacation time, most companies provide informal employee benefits. These include events such as company picnics, golf outings and discounts on their products.

Consultants are sometimes included in these employee activities, but it cannot be assumed. In many cases, consultants are considered outsiders and held to a different standard. You are not an employee of the client and it can't be assumed that you share in the informal employee benefits. It depends on the client whether it is acceptable for an external consultant to participate. Before participating in any informal client-sponsored activities, make sure you are invited. Moreover, if they invite you, it is usually proper etiquette to attend.

Client employees are also often allowed privileges such as selling candy bars as fund raisers for their child's sports team, bringing their children to work with them if they have a daycare issue and dressing for Halloween. These scenarios are

rarely appropriate for a consultant to do at a client site. The client pays a high hourly rate for a consultant's time and expects them to be focused on their work without such distractions.

Bottom line: make sure you know your place and error on the side of conservatism.

Tip #8: Don't Make the Firm Look Bad

Case Study:
Diane, a Senior Manager with her consulting firm, had been on a client site for a project to analyze the client's current vendor relationships. They needed to determine whether they could reduce the number of vendors for more efficiency. Her firm sold the client on their analysis methodology which was more expensive than their competitors and included a formal scoring process for each vendor based on several objective factors including their long-term viability, knowledge of the client's industry and their delivery capabilities. Diane also met with each vendor's account managers and members of their implementation teams. In the process, she developed personal opinions based on her like and dislike of each firm's representatives.

Robb, the client executive wanted to reduce the number of their vendors and wanted to know the findings indicating which vendors could be eliminated and with which ones to consolidate their business. In a meeting with the client's senior management to discuss her findings, Robb asked her "Based on your analysis, which software vendors can we consolidate functionality and which ones can we begin phasing out?"

"Would you like to know my opinion or the firm's opinion on that?" she asked in response. She then explained that, although the tool they use to assess each firm's ability to support the client's needs provided them with one set of results, she had her own opinions such as the vendor responsiveness and their general attitude. Much of this was

based largely on her personal opinions of the individuals with whom she met.

Robb left the meeting confused. He wondered why he paid such a premium for their methodology if they were just going to undermine it with a different set of subjective information.

One of the main functions of a consultant is to facilitate decision making for the client. In order to do that, the information you provide to the client must be as objective as possible. Many firms have tools to assist in providing objective data to clients without being tainted with irrelevant data.

A consultant should be careful not to undermine a firm's tools or methodology with opinions or suggestions that contradict the results. This will hurt the firm's credibility with the client and, eventually, their own. Care should also be taken to avoid undercutting opinions of fellow consultants. When providing formal client recommendations, team members should meet to discuss the data and form an agreed upon solution. Not all members of the team will agree at all times. In these situations, the most senior member of the team will decide the approach. At that point all team members, whether they agree with the decision or not, need to support the decision so that the firm is consistent in their communication. If a client points out an inconsistency between your opinion and that of a fellow consultant, back out of the conversation gracefully until you can confer with the other consultant before discussing the issue with the client any further.

Tip #9: You May Be Viewed As the Enemy

Case Study:
Carla was excited about her new project assignment. She was a project manager implementing an Electronic Medical Records application at a major hospital. She planned the kick-off meeting with several key physicians, nurse practitioners and administrative staff. Most of them arrived late and their body language indicated that they weren't happy to be there.

As she started the meeting by giving an overview of the system and the timeline of the project, there were several complaints that the schedule was too aggressive. Throughout the meeting there were negative comments questioning the need for an EMR at their hospital. They also second guessed her firm's approach and didn't hold back on their condescending heavy sighs over many of the details of the application.

It didn't get any better once the project got into full swing. Few of the staff members were cooperative and some were blatantly disruptive. Although nobody on the staff did anything to openly sabotage the project, no one made any effort to ensure the project's success.

Carla tried her best to befriend people on the project, but got no response back. One day she had a one-on-one meeting with an administrative assistant. While they discussed the system's data entry interface and how much easier the Physician Order Entry module would be, the assistant asked "How many of us do you think this system will replace?"

"I haven't heard any discussions about staff reductions." Carla replied. She went on to explain the reasons the hospital was implementing the EMR system, including providing higher quality healthcare and improving their efficiencies. The assistant explained to her that there were rumors that 10% of the administrative staff would be fired and that physicians and nurses would be given more work as a result. It dawned on Carla that that was why there was so much resistance to the project from the staff.

Consultants are generally brought in by the client's senior management to assist them in solving a business problem. Often times, the solutions provided by a consulting firm result in unpopular changes. These changes can range from new organizational structures that disrupt employees' daily routines to efficiencies that result in the need for fewer employees, resulting in lay-offs. To a client's employees, consultants are often synonymous with bad news.

Too often, from the employee perspective, consultants are outsiders that come onto their turf and hold secret meetings behind closed doors with the executives. They huddle in their war rooms and strategize how to disrupt their jobs by cutting minutes off of processes and eliminate as many employees as possible to justify their inflated rates. IT consultants conjure up computer applications that automate processes to eliminate manual processing, again resulting in head-count reduction.

Even when consultants are brought in to augment the staff temporarily for a large project, employees often assume the consultant is there doing the same work as them, for more money. Consultants need to be aware of these client concerns

and focus on the benefits of the system to them. Above all, do not lie to them. If you know that there will be staff reductions, do not tell them that it won't happen. It's better to suggest they talk to their management and focus on the project tasks.

Tip #10: Don't Make Yourself Too at Home

Case Study:

Marge is an employee at Harrison Securities, Inc. She sits in a cubicle adjacent to a conference room on her floor. Magnusson Consulting Group has been brought in to do a performance study and has been given the conference room as a "war room" for the five consultants to do their work. After about a week, the team began to get to know each other better, becoming a cohesive team. They also began working late nights and ordering dinner in. As a result, they got more comfortable with each other, joking around, discussing what they did over the weekend and sharing personal stories with each other. As the comfort level increased, so did their volume.

Marge began noticing that she could overhear their conversations, but it didn't bother her at first. As the consulting team began to chat more often and with higher volume, it started becoming a distraction. Marge often talked on the phone to customers and she wondered if they could hear some of the personal, sometimes inappropriate conversations emanating from the nearby conference room. When she came to the office in the morning, she would see that they left remnants of their previous evening's dinner–pizza boxes, Chinese takeout containers, etc.–outside the conference room door for the cleaning people, who had evidently already gone for the night before the consultants left. The odor of the stale smelling food lingered for most of the day.

The final straw came when Cody and Michelle, two of the consultants walked into the war room from a

confrontational meeting complaining about the incompetence and stupidity of Marge's boss, Jerry.

"That SOB Jerry has to be the biggest dumb ass I've ever met in my professional career." vented Michelle.

Marge estimated that Michelle was no older than twenty-five and wondered how many dumb asses she could possibly have met to date. And although she had her own personal questions concerning the volume of gray matter Jerry carried around with him, she thought it was inappropriate to say such things and unprofessional to say them so they could be overheard by client employees. She reported their behavior to her boss who wasted no time calling the firm's account manager.

When clients bring in a consulting team, they don't always have ample space for them to work. Consultants are often put in a conference room–usually the size of a large closet–as a war room. Consultants frequently sit two or three to a cubicle designed for one person, or even sit at tables lined up along a corridor. Add to this that they are often treated as outsiders by the client's employees. A "we vs. them" mentality develops and causes them to develop a camaraderie that fosters a more casual environment among them.

Consultants are invited to client sites to perform work. It's always best to act as if you are a guest in the client's home by remembering the following things:

- Keep voices down as low as possible. It avoids disturbing the client and keeps them from hearing things they don't need to hear.

- If a contentious conversation must be held, make sure it is not overheard. Close the door or move to another location out of earshot of others.
- Personal conversations should be held to a minimum and out of range, preferably in an off-site environment such as lunch.
- If any food is brought to the workplace, be cognizant of its odor and dispose of all residual trash in a place that will not interfere with others, such as in a cafeteria or a break room.
- Avoid use of foul language or subjects that could be considered offensive to anyone overhearing. Contrary to what you may think, few people are all that interested in your sexual exploits or your political views.
- Never criticize an employee of the client, their business operations or facilities. Even if a client eavesdropper happens to agree, they may not appreciate an outsider's criticism.

Tip #11: Clean Off Your Desk

Case Study:
Annette was a consultant assigned to two projects on a part-time basis splitting her time about fifty-fifty at each client site. As a result, she generally had to carry a lot of information for each client with her. Although much of the documentation was kept electronically, she also carried around a fair amount of paper documents from each client. While at one client, she was working on a document for the other client right up until time to run to a meeting.

Soon after Annette left for the meeting, the client manager stopped by to ask her a question. He saw papers with another client's letterhead as well as work on his computer screen for the other client. He began to wonder if he was paying fees for Annette to work for him or other clients.

Consultants often work for multiple clients at the same time. This becomes a juggling act at times. Always make sure you're dealing with the right documents, e-mail addresses and issues for your current client.

While at a client site:
- Never do work for another client, whether paper- or computer-based.
- When leaving your desk always gather up all papers, including any for the current client and place them out of site.

- Lock out access to your PC whenever you walk away from your desk.
- If you use a laptop or notebook, take it with you or lock it in a drawer.
- When you leave at the end of the day, your desk should be completely cleared off.
- Don't engage in phone conversations or side conversations about one client when on-site at another.

Tip #12: Limit Personal Online Usage

Case Study:

Jeff was a hard worker and worked long hours. He was on a project with a tight deadline and they were running behind. He had put in several thirteen-hour days and was also working on the weekends. He was well-organized and, as a result, was a good multi-tasker. He always had several applications open on his computer at any given time and could switch from one to the other in a flash.

He also kept several tabs open on his Internet Explorer for sites that he used for both work and personal purposes. He would check his personal e-mails and Facebook three to four times a day. It never took more than a few minutes each time and, based on the hours he worked, he more than made up for it.

Dominic, a manager for the client received an Internet usage report weekly from IT. Scanning the report for exceptions, he noticed that Jeff's usage showed a large number of hits to Yahoo, Facebook and several other sites that raised his unibrow.

That afternoon when he met with Jeff's account manager, Dominic showed him Jeff's Internet usage report and asked why he was spending so much time on the Internet for personal usage. "Is this why you guys are behind on the project?"

After the meeting, the account manager took Jeff to a conference room and chewed him a new one.

"What the hell are you doing on the Internet all day while we're all trying to get a project completed?"

Jeff stared at him in disbelief. "I check personal stuff a couple of times a day. Why are they getting all bent out of shape over that?"

It's the rule more than the exception today that companies track Internet usage closely, particularly for consultants. Software is used to block inappropriate content such as pornography, dating and job search sites; however other sites, which may need to be used for legitimate business purposes are not blocked. These are allowed, but tracked for frequency, length of time visited and context.

The best rule to follow is to only use the client's Internet access for legitimate business purposes. There are times when a commercial site needs to be accessed, for instance to order dinner when the team works late. A manager with the consulting firm or the client should be made aware so there are no surprises on the client's usage reports.

Clients may state that they block illicit sites, but don't track usage. That sets the expectation that if it isn't blocked, it's okay to access. That is not a license to surf the web. Regardless of the filters set up by the client, or the sites the client's employees visit, use the client's Internet access sparingly and for business purposes only. If you have to use it to order a pizza or look up a phone number, keep a log of the times and purpose in case you're questioned about it.

Tip #13: Avoid Personal Activities

Case Study:
Cheryl had been on-site with her client for over a month. In that time, she had become close with several of the client employees. She had gone to lunch with the client manager to whom she reported and even went shopping with her a couple of times. As she got acclimated with the client's culture she saw that it was acceptable for employees to do personal activities such as hold personal conversations on their mobile phones and pay their bills at their desk. Before long, she felt comfortable doing some of the same things at her desk.

That Friday, when Izzy, her Account Manager showed up for a status meeting, she pulled her aside and explained that they had reported overhearing personal conversations and seeing her doing personal activities at her desk.

Cheryl was stunned. "Their people do it all the time. Why are they singling me out for that?"

"It may be that they haven't seen their employees do it," Izzy replied. "But either way, clients usually give their employees more latitude than they give consultants. They're paying a lot more for you and the project that you are working on is much more critical to the company than what most of their employees are working on."

Cheryl understood Izzy's points, but she wasn't completely convinced. "The double standard just doesn't seem fair."

"Look at it this way. If you were hired to work for the client you may have a lot more freedom to do some of those

things, but your salary would likely be lower and you might not get assigned to high profile projects like this. It's a tradeoff. Only you can decide whether it's worth it or not."

Client perception is a critical factor in consulting. From the client perspective, they are paying top dollar to have experts come in to perform a task.

There is often a double standard between the way clients treat employees and the way they treat consultants. Clients have made a long-term commitment to their employees and may allow them some latitude to do personal activities on company time. They usually have a higher interest in their employees' morale and general happiness.

Consultants, on the other hand, are hired on a short-term basis, at a higher cost, to accomplish a specific objective. It is often a high-profile project that has executive attention. The client expects a laser-beam focus on that objective. Consultants should not do anything to give the impression that they are distracted, too casual, or in any way focused on anything other than the client's work.

Tip #14: Don't Use Client Resources for Personal Use

Case Study:
Takume was an offshore consultant brought onshore for a two-month period to gather requirements and act as the subject matter expert (SME) for the offshore team. He was working at his desk one December afternoon and noticed something exciting. He looked out his window and saw snow for the first time in his life. He went outside and admired it, touched it and picked some up to watch it melt in his hand. Then he took a few quick pictures with his phone. When he returned to his desk, he connected his phone to his PC and uploaded the pictures to his personal Web site and e-mailed his friends back home to check the new pictures out.

The next morning, Takume's account manager received a call from the client's security director. His network monitoring software had identified an upload of three images to an external IP address that was not on their approved list. He informed the account manager that the firm would be fined $5,000 for violating the security regulations that they signed as part of their Master Services Agreement.

That afternoon Takume went back home with only some pictures of snow. He was fired the next day.

As I've stated before, you should act as though you are a guest while at a client site. This is just as important while using their computer equipment as their office space. Most companies monitor network usage closely and many have contractual

requirements with their consulting vendors regarding what is, and is not, allowed. Management at the firm should review these regulations with the team at the beginning of a project and revisit them regularly so that no one is surprised. That will greatly reduce the chance of the regulation being violated and harming the client relationship.

Additionally, when joining a project, ask if the regulations have been documented. In any event, it's best to error on the safe side by using the client's equipment only for legitimate, project-related activities.

Tip #15: Be Prepared to Do the Client's Dirty Work

Case Study A:
Alan managed a six-member consulting team at an office machines distributor. They were hired to perform a software analysis. As part of the project they were required to meet with several software vendors to select a package that best met the needs of the client. After paring the list down to three, the vendors were invited to present demonstrations of their software to selected client team members. Alan had done a number of these projects in the past and had come to know the sales reps at most of the software vendors in the industry. They usually treated Alan well to stay on his good side. It helped them ensure being invited to demos for future clients.

After they presented the demos, the client's team members completed their analysis forms that were used to grade the vendors. Although the evaluations were designed to use as objective of criteria as possible, some evaluators skewed the results based on personal biases.

When all of the presentations were completed, Alan and his team met with the evaluation team to discuss their findings. All three vendors' packages had similar functionality and any one of them could have met the requirements, but the first vendor seemed to be a better fit for the client's requirements. After much deliberation, they selected the third vendor based more on their personal biases than the functionality. The team felt that this vendor was more likable and would be easier to work with.

Alan was given the task of informing the losing vendors that they were not selected and the unenviable responsibility of explaining to them why. He needed to be diplomatic in telling them that their competitors were a better fit though he didn't agree.

Case Study B:
As the vendor analysis phase wound down, Alex began preparing the proposal for his firm to perform the implementation of the selected application. The client manager spoke to him and said that if they were invited back to do the implementation, that he did not want Angela to be on the team.

Angela was one of the stronger members of the team and had developed an in-depth knowledge of the client's business. Alex had intended on putting her in a lead role for the implementation. Somehow, during the project, she had done something to rub the client manager the wrong way. The client would not provide any specific reasons other than that he didn't feel she was a good fit for the project. Alex had no other options. He arranged with another account manager to have her transferred to another project, but he was not able to give her a concrete explanation on why she was not invited to be on the follow-on project.

One of the many roles of a consultant is to be the stand-in as the bearer of bad news to vendors and other fellow consultants. This often puts consulting managers in an awkward position. The client can decide, for ambiguous and undefined reasons, not to continue dealing with a vendor or an individual consultant. A consulting manager needs to have the ability to

communicate to a vendor as many solid facts that will help them learn from their mistakes, however, if the client does not provide adequate rationale, the consultant manager must be careful not to criticize the client's decision or their decision making process.

If a client requests that an individual consultant be removed from a project, they may also give a logical rational such as a lack of industry knowledge or experience. Often times, a consultant can simply annoy a client manager with a single comment in a meeting, a personality clash, being too aggressive or not aggressive enough. If the consulting manager believes that it is more beneficial for the individual to stay on the team, she should try to convince the client, but the client has the last say. When explaining the change to the consultant, it is best to focus on positives such as better opportunities on other projects.

Tip #16: Schmooze the Client

Case Study:
Paul was the director of marketing at a major retail organization and was considering bringing in a consultant to analyze their current marketing plan and potentially help develop a new marketing strategy. He contacted account managers for three of the more prestigious marketing consulting firms in the region and scheduled meetings with them.

His first meeting was with Frank, an account manager at Marketing Consulting Partners. Frank made a great first impression. He came in to Paul's office smiling, looked him straight in the eye and gave him a firm handshake. They exchanged pleasantries for a few minutes and Frank immediately began with his opening, "I know that you are very busy and I'd like to get right to business." He provided Paul with the usual glossy brochures that explained their offerings and presented his pitch for the next thirty-five minutes. At that point, he asked Paul if he had any questions. Paul liked MCP's offerings and had a few questions for Frank about how their expertise would fit with the needs of Paul's organization. Frank answered most of his questions and made notes of items for follow up. The entire meeting was succinct and efficient and ended in less than the scheduled hour.

Paul then met with Dave from Marketing Alternatives. Dave was a boisterous, fun-loving guy that wanted to be Paul's best friend the minute they shook hands. Dave saw a picture

on Paul's desk of him standing by a Corvette. "Wow! That's a nice car! Is that yours?"

"Yes, I've had it for about two years."

"It's a beautiful car. That's a Corvette, right?"

"Yes", responded Paul, "It's a 1976 C3 Corvette Stingray."

"I'm in to horses myself. I own a few and race them." He spent the next fifteen minutes telling Paul how he got into horse racing and ownership, the types of horses he's owned and what a fun, but expensive hobby it is. He eventually got to the subject of MA's marketing offerings. He went well beyond the allocated hour and Paul finally had to stop him so he could go to his next meeting. As Dave left, he suggested that they go to the race track some Saturday so Paul could take a look at his horses.

Paul's final meeting was with Noah from Advanced Marketing Concepts. Noah also made a great first impression. He was on time and met Paul with a firm handshake. As they introduced themselves, Noah noticed the picture on Paul's desk of him standing next to his classic Corvette.

"Is that your car?" he asked Paul.

"Oh yeah, that's my baby."

Noah didn't know much about cars and had little interest in them. He was much more interested in boats. He had owned three and currently had one which he took clients out on weekends. He asked Paul what year it was, how he found it and whether he had restored it. Paul was obviously proud of it and enjoyed telling anyone about it that asked.

After about ten minutes, Noah transitioned the conversation to Paul's marketing plan. He provided glossy brochures, similar to the ones Frank and Dave provided, and

discussed each of their offerings. At the end of the hour, Noah suggested that he and Paul meet again for lunch and have some of Paul's Marketing Managers come along to discuss their needs.

"I also have a boat that I take out on the lake on weekends. Perhaps we could take it out some Saturday." The meeting went a few minutes beyond the allotted hour.

The three examples above show different styles of relationship building. First, Frank made little attempt to develop a relationship. He went straight to business and left when he was finished. Dave, on the other extreme spent more time and energy trying to develop a relationship, but focused the attention on himself and his own interests. He successfully found an item that might be of interest to Paul and used it to segue the conversation to himself and his own interests.

Noah, however, like Goldilocks' porridge, was just right. He found a way to get to know Paul a little better by getting him to talk about himself. Although he didn't know much about Paul's interest, he took an interest in him, by showing an interest in it. Noah also found a way to insert his own interest in boating, but did not spend too much time on it by mentioning it at the end of the meeting. It might have been a shared interest with Paul, and possibly increase the chances of a follow-up meeting.

Few people that are new to consulting will make sales calls alone. Every consultant, however, is responsible for sales in some capacity. Even a new college graduate will have opportunities to talk one-on-one with client management. Sales are predominantly about relationship building. Whether right

or wrong, even if your product offering is head and shoulders above the rest of the competition your chances of getting the sale are greatly reduced if you haven't developed a strong relationship with the decision maker.

Take an interest in client's personal items on or behind their desk. Try to find something that interests you in the effort to find common interests, but focus the conversation on the client.

Tip #17: Client Employees Have Their Own Jobs to Do

Case Study:
Emily was consulting on a project at a major retail company where her role was to serve as a business analyst. She was responsible for meeting with a cross-functional team of client employees to define requirements for their new application. She planned three 2-hour meetings each week over a six week period to which all twelve client team members were invited. In each meeting, she focused on a specific area of the business. Some of these focused areas had little or nothing to do with the business functions of some of the meeting invitees. Emily noticed that in some meetings, team members either left early or did not attend at all. She was concerned that they would miss important business rule definitions or that some definitions would be incomplete without the input of the full team.

In her weekly status report, she raised an issue that lack of full participation of the client's cross-functional team may adversely affect the quality of the application. The client manager replied that she had received feedback that the requirements gathering meetings were wasting a lot of their time because they discussed requirements that did not affect them. Many were, in effect sitting through six hours of meetings a week with little opportunity to provide input or affect the design of the application.

When consultants are charged with executing a project at the client it is usually their single focus. Client employees usually get assigned to assist on the project, but it is rare for the project assignment to be full-time. Instead, it is in addition to their other daily responsibilities. Consultants need to be respectful of their time and coordinate meetings and other responsibilities so that their time is utilized as efficiently as possible.

When working with a client team:

- Limit full-team meetings as much as possible. If the input of only a few team members is required, meet with only the necessary team members, providing meeting minutes to all team members to keep them up to date.
- When scheduling meetings with all team members, provide an agenda at least one day in advance, detailing which members of the team are critical to the discussion. This will allow each team member to decide if they need to attend. Again, meeting notes should be distributed to the full team.
- Be flexible with team members' ability to attend meetings. If they are unable to attend a meeting in which their input is critical, arrange a one-on-one session with them before the meeting to get their input so that it can be discussed in the meeting.
- Determine the commitment level of each team member at the beginning of the project. This should be an assumption detailed in the original consulting agreement. If any team member is unable to meet their commitment, the client manager should look into reducing their other commitments, or replacing them with someone that can carry out the responsibilities.

Tip #18: Keep Client Management in the Loop

Case Study:
Amanda was eager to get started on her new consulting assignment. She was the project manager on a marketing study at a major consumer products company. The client provided a team of eight employees to work with her four consultants to develop a marketing campaign. Steve Adams, the VP of marketing, had hired Amanda's firm for this study and had hand-selected the team of employees to serve on the project. As soon as Amanda received a client e-mail account, she scheduled a kick-off meeting with all of the team participants. She attached an agenda which included introductions, an explanation of the objective of the project, a proposed timeline and responsibilities of each team member. The key team member that Amanda forgot was Steve. In addition to not being invited to the kick-off meeting, Steve had not yet met with each of the team members to ask them to participate or even to inform them of the upcoming project.

Steve got upset when he received an e-mail from one of the invitees asking about the meeting. He felt that Amanda had gone around him in scheduling the meeting without his approval. Steve also thought he should have been allowed input as to the meeting's agenda.

Steve called Amanda and asked why she scheduled the meeting without his approval. He also inquired on why he wasn't invited or allowed to review the agenda prior to it being sent out to the team.

Amanda was perplexed. She assumed when Steve gave her the list of names, that they had already been informed of the project and given their commitment. As an executive, she didn't think Steve would be interested in that level of minutia in the project. She asked why Steve would give her names of team members without having first obtained their commitment and directly questioned why he would be involved in such detail.

That was not a good move. Steve was even more angered now. He explained to her that he is responsible for the success of this project and it is imperative he be included in all of its activities. Amanda tried to apologize, but it fell flat since she still felt she was right and that Steve was micro-managing. Amanda considered the project her rightful responsibility.

Every manager has their own style and expectation for involvement. Amanda made two big mistakes in this situation. First, she made assumptions on Steve's management style and incorrectly took for granted that he would not want to be involved in the kick-off meeting. In their first meeting, she should have asked Steve what level of involvement he expected on meetings and any team communication. She should also have run her planned next steps by Steve to obtain his approval. Without knowing Steve's management style or his expectations, she should have sent a draft of the agenda to Steve for his input and suggest a kick-off meeting as a next step. This would have given Steve the chance to provide his own input to the agenda and hold off Amanda from scheduling a meeting until all planned participants had been informed.

Amanda's second mistake was not accepting responsibility for excluding Steve from the process. Regardless of Amanda's opinion of how involved Steve should be, as the client sponsor, it was Steve's decision. When Amanda received the call from Steve and learned that he was upset her one and only response should have been to apologize, beg forgiveness and ask for Steve's direction in correcting the mistake in a way that saved face for Steve.

Tip #19: Deal With Personal Problems Privately

Case Study:

Mitch was going through a rough period in his life. His wife had recently asked him for a divorce and his son was going through some major behavioral changes. Mitch wasn't sure if his son was just having trouble dealing with his parents' marital issues or if it was more serious.

All of this made it difficult to concentrate at work. He received a rather nasty e-mail from his wife one day and it upset him so much he began to break down at his desk. A client employee stopped by to ask a question right as he was falling apart. He pulled himself together enough to answer the question and explained that he was going through a tough time in his personal life. Although Mitch hardly knew this employee, he unloaded on her, telling her about his divorce, how spiteful his wife had been and the effect it had had on their son.

The client employee mentioned this to her manager, who in turn, spoke to Mitch's manager. The client manager claimed that she didn't want to be insensitive to Mitch's problems, but was concerned that it may be a challenge for him to meet the aggressive deadlines on the project if he was that distracted.

Every individual has highs and lows in their life. At times, the lows can be so overwhelming that they negatively affect all other responsibilities. Clients are human and can usually

empathize with personal hardships that consultants go through in their personal lives. But they are also business people and will take issue with paying consulting rates for an individual that is not providing an appropriate level of production.

Consulting firms recruit people that are considered the best of the best. In addition to possessing a marketable industry skill set, exceptional interpersonal skills and the ability to learn complex concepts quickly, they expect individuals to have stable lifestyles and the ability to deal with personal issues without it interfering in their consulting responsibilities. During the recruiting process, firms are limited by how far they can legally inquire into one's personal life. If a consultant's personal issues cause them to be ineffective at work on a consistent basis, however, it may negatively affect their ability to advance within the organization.

When faced with highly emotional personal issues that could divert your attention from client responsibilities, a consultant has a number of options:

- Depending on your relationship with your manager, describe your issues with them in as much detail as you are comfortable. Explain that this may temporarily distract you from your client responsibilities and ask if they can temporarily assign you to a non-client facing project.
- Speak to the firm's Human Resources department. An HR representative can explain your options for a short-term leave of absence or for an Employee Assistance Program in which they provide counseling services–in confidence-to help employees through difficult times.
- If you anticipate a long-term period of stress in your personal life that will affect your performance as a

consultant, you may want to reconsider whether it is in your best interest to continue your career as a consultant.

Consulting can be a demanding career that taxes you with the number of hours and the level of stress and responsibility. If there is anything in your personal life that will keep you from being at the top of your game a lower stress alternative may be best. It is common for people to take a break from consulting and re-enter a couple of years later. This may be a good time to take a respite to help get through a difficult time.

Tip #20: Anything You Do Can Affect Your Image with the Client

Case Study:

Neil and Larry were managers on a large consulting project at a Fortune Fifty manufacturing firm. Over the course of the project, they became good friends. They went to lunch regularly and had even shot a few rounds of golf together on weekends.

Their responsibilities on the project were closely related and on a daily basis, they met for coffee for about twenty minutes in the client's cafeteria. These were informal meetings where they would review the responsibilities for each others' teams and determine if there was any coordination they could do to get the best efficiency on the project.

The client manager was aware that Neil and Larry were close friends. He had joined them for lunch in the past and got along well with both of them. It bothered him, though, to see them sitting in the cafeteria every day as he walked through to get coffee. He knew they each billed for more than two hundred dollars per hour and he felt he was paying them to chat over coffee. When he received the next invoice from their firm, he questioned them on how many of their hours he was billed for them to chat in the cafeteria. They were surprised by this question because they felt these meetings added value to the project and made them more efficient. From then on, they met in a conference room to hold a more formal daily meeting.

Despite what people may tell you about not worrying about what others think of you, it is absolutely important in consulting. Client employees often feel threatened by consultants and view them with an air of distrust. Client Managers are aware of the rates they pay for consultants' time and will view any impression of loafing on the job as a waste of their money. When consultants demonstrate any of their activities in too casual of a manner, it can give the impression that the client is paying for activities with no value.

Meetings should give the impression of a meeting: held at a desk or in a conference room. Co-workers often make friends, which is acceptable. Giving the impression that you are taking breaks with your friend rather than working gives the client reason to question billed hours. That is not a situation you want to be in.

Tip #21: Don't Flaunt Client Expenses

Case Study:
Mandy was on an out-of-town project for a healthcare firm. She flew from Chicago to their headquarters in San Francisco every Monday morning, returned home on Thursday evenings and spent Fridays working from home. She reported all travel-related expenses on her weekly expense report. Her client reimbursed those expenses. Her five-person team went to dinner together once or twice a week and enjoyed trying different local restaurants.

They would often ask the client employees for suggestions for local restaurants. They would share stories of their dinners and restaurant critiques with client employees and managers the next day.

The employees knew that their company was paying, not only for their hourly rates, but also for them to dine at some of the nicer restaurants in the area that they could not afford. After a while, they began to resent hearing about the dinners Mandy and her team enjoyed while they rushed home to cook dinner for their families.

Business travel is often glorified by people who don't travel. Somehow they get the impression that it's a vacation every week. The fact is that business travel is not very glamorous at all. Consultants are away from their families, friends and significant others every week. They miss baby's first steps, ball games and birthdays. They spend their weekends catching up

on laundry and running errands they couldn't do while they were out of town.

Traveling on a weekly basis gets old fast. Delays at airports, long lines, cancelled reservations and lost luggage make for a great deal of wasted time and frustration. Added to that, living in a small hotel room alone three to four nights a week makes for a less than desirable lifestyle.

Perhaps the one perk to traveling is trying new restaurants on the client's dime. This actually happens less often than clients realize. When traveling to client sites, consultants usually log late hours to get a project done. The standard fare is take-out food eaten in a conference room.

When consultants do get a chance to dine out it is best to keep it to themselves. Clients have enough reasons to resent consultants. Flaunting dining at up-scale restaurants adds fuel to that fire. Additionally, client managers that approve consulting invoices don't need to be reminded that in addition to hourly rates, they're also paying for fancy dinners.

Tip #22: Do Only What the Client Is Paying for

Case Study:
Cindy had always been a problem solver and that made consulting a natural career choice for her. She had been in IT consulting for about six months and liked what she was doing. She was assigned to a new project for about a month and the client liked what they saw so far. She was writing programs for part of a large application and had beaten every deadline they had given her.

Her latest assignment was to write an application that would retrieve data from three existing programs. Then it was to process that data based on defined business rules and store it in the database.

One afternoon, while working on her program, she noticed a major flaw in one of the programs her application called. She began looking through it and figured out that the called program was performing some calculations incorrectly. She began digging in a little deeper and figured out how to fix it. She made the fixes to the other program and tested it thoroughly. She ended up staying late that day, spending about four hours fixing the client's program. She was proud of herself for fixing the bug.

The next day, she reported to her manager what she had found in the other program and her efforts to resolve the problem. Her manager didn't respond with the delight she expected. Instead, he was angry that she modified the client's program without approval. That program was called by several other applications. It had been tested, signed off and

deployed to their production environment, and should not have been modified without the clients knowledge and consent. This was going to cost them a lot of time changing the code back and retesting, hours that the client would not be willing to pay for.

Although Cindy had good intentions, she went well outside of her authority by making changes to code that was not her responsibility. In addition to the hours she spent making the changes, for which the firm could not bill, she caused additional non-billable hours to be spent reversing her changes and performing additional testing.

Solving problems and being helpful is what consultants are paid to do; but every project and every task has a defined scope that needs to be adhered to in order to avoid unauthorized–and unwanted-work being performed.

Tip #23: Stay Politically Neutral

Case Study:

Jim had been a member of the Young Republicans since the age of sixteen and was the president of the campus chapter in college. Since graduating, he had volunteered for the election campaigns for several local Republican candidates.

Once while working on a client project, Jim was at lunch with Ashley, the client manager. Ashley started talking politics and railing on the liberals in congress that were, in her opinion, ruining our society as we know it. Jim jumped on board and they got into a deep political conversation in which they both agreed with each other.

A few weeks later, Jim and Ashley went to lunch with Ashley's boss Tom, the project sponsor. During the conversation, Tom mentioned something their current Democratic Senator had said in the news the previous day. Jim began to criticize the Senator, his statement, and his policies in general. Unfortunately, it took him a while to notice the look on Ashley's face to indicate that he needed to shut up.

By the time he noticed, it was too late. Tom told Jim that he was a staunch Democrat and a big supporter of the Senator. Jim politely changed the subject, but the damage had been done.

It's an age old saying that one should never discuss politics, religion or money. This is excellent advice for consultants. Even when you are with an individual or group that makes

statements you agree with there is rarely any good that comes out of speaking your opinion on these matters. When the conversation veers that way, it's best to change the subject back to business. Sports can often touch a nerve here or there, but it is much safer than politics.

Tip #24: Lose the Battle, Win the War

Case Study:
Traci had a competitive spirit all of her life and always loved a challenge. She saw consulting as an excellent way to test her abilities. As a business analyst, she was assigned to a client to facilitate requirements gathering sessions and document business requirements for a new application. She took copious notes and had a sponge for a memory. The client liked this because she could identify inconsistencies in requirements definitions on the spot, which eliminated the need to do rework later in the project.

After all of the sessions had been held Traci documented the requirements. She obtained signoff from all the users for the application so the developers could begin their programming.

During the development and testing phases, questions often arose regarding the documented requirements. Traci easily answered them based on her notes and excellent memory of the conversations. When it came time for the user community to perform their User Acceptance Testing (UAT), they came upon a problem where the programs did not function as the requirements stated.

Traci was called into the meeting and they described the situation to her. The issue came down to interpretation. The business requirement in question was worded in a way that could be interpreted in two different ways. Traci–and the programmers–interpreted it one way, while the users saw it in a completely different light. Having remembered the

conversations about this requirement, Traci held her ground and refused to admit that she interpreted it wrong. This caused some bad feelings with the users and eroded a lot of the goodwill that Traci and her firm had built up over the past several months.

The issue was left at a stalemate at the end of the meeting. When Traci took it to her project manager, he decided that they should modify the programs to work the way the users saw it at no extra charge to the client. Traci was furious that he did not support her in his decision. She was certain that she had worded the requirement and interpreted it exactly as the users had specified in the requirements sessions.

Whether Traci was correct in regard to the requirement is irrelevant. As soon as Traci recognized that the issue was not with how the requirement was worded, but how the two parties interpreted it, the issue should have been tabled until she could discuss it with her project manager. It's often better to fall on your sword and do whatever it takes to resolve a problem at the firm's cost, rather than risk hurting the client relationship.

The project manager has better visibility of the project finances and can take into account, among other things:

- How much contingency or extra built-in time is available for such situations.
- The amount of time required to make the correction.
- Whether they will harm the relationship with the client more by fighting back vs. making the fix.
- Whether they are setting a precedent for fixing anything the users happen to change their minds about.

Proving yourself right may give a temporary feeling of winning, but it is always better to step back and look at the bigger picture to determine what the long-term effects are. Being stubborn seldom helps you win an argument or strengthen a client relationship.

Tip #25: Know the Client's Gift Policies

Case Study:
Joel was the Project Manager on a project for a new client and was eager to make a good first impression. He had scheduled a kick-off meeting with all of the client's project team members, including the executive sponsor team and several managers. Knowing that people like free stuff he arranged to get various items with the firm's logo for give-aways at the meeting. At every seat he placed a mouse pad, a coffee mug and a mechanical pencil, each with the firm's logo emblazoned upon them.

As the team rolled into the meeting, most team members expressed joy at the gifts placed at the tables. The last person to come in was Margaret. Joel began asking the room to quiet down so he could begin going through the agenda. Margaret was a client manager that Joel had already found to be difficult during the initial planning stages.

She raised her hand and asked "Are these items supposed to be for our employees?"

"Yes", Joel replied, "These are just some gifts from our firm for your folks."

"Perhaps you didn't know Joel, but we have a strict policy against accepting gifts of any value from our vendors. It is documented in our Loss Prevention Policy."

Joel was a little taken aback. He couldn't believe she would make an issue of such inconsequential items. He quickly apologized and explained that he was unaware of that policy. He told them they could leave the items on the tables and he

would collect them and take them back to his office after the meeting.

The remainder of the meeting went without incident, but Joel felt deflated by being shot down in such an embarrassing manner. At the end of the meeting, after everyone left, he did the funeral march around the room, collecting his rejected offerings.

Most companies have policies regarding vendor gifts that are set at a dollar value threshold. Any gifts above a certain value must be either returned or reported to management. These policies are clearly to avoid conflicts of interest by bribing managers with valuable gifts or vacations in return for business contracts, but some clients have a no tolerance policy for any gift giving. Determining the client's policies prior to the meeting and having the gift approved by management ahead of time would have saved Joel his public embarrassment.

Tip #26: Protect the Client's Confidentiality

Case Study:
Andy was a marketing consultant working at Polk Manufacturing. He had been on their account for well over a year and was helping to develop marketing plans for their new products. Polk had a new product for which they had recently applied for a patent. It was part of an exciting new line they hoped to introduce next year to leapfrog the competition.

It was difficult for Andy to hold in his excitement of the new product. If it did explode in the marketplace, like they all expected, this would be the beginning of a huge marketing contract for Andy and his firm. They would have the potential to beat out some of the other marketing firms that Polk currently used.

One Saturday evening, on the way to the movies, Andy told his wife Elaine about the Polk product and how excited he was about it. This could really be the boost to his career that he had been waiting for.

The next week, Elaine was at lunch with one of her friends at a local restaurant. As the conversation evolved to their husbands' jobs, Elaine told her friend about Andy's enthusiasm over this new product at Polk Manufacturing and how it could really catapult his career with the firm. At the next table sat Fred Garvin, the VP of New Product Marketing at Polk Manufacturing, overhearing the entire conversation.

That afternoon, Fred went back to the office and summoned Andy in. He explained what he had heard and fired Andy's firm on grounds that they violated their

confidentiality agreement. Security escorted Andy and his team to the lobby.

Consultants are often privy to more confidential client information than many of the client's own employees. They are often contracted to work on high-profile projects and are required to sign confidentiality agreements. It is not always made clear what pieces of client information are confidential. Best practice is to assume all client information is secret unless you see it in their commercials or on their Web site. The speed of word of mouth and the inability to control who may overhear information makes it difficult for you to monitor it. Always assume that confidential means it should not be discussed with anyone who does not have a reason to know. This includes spouses, children, friends or even peers within your firm. Confidential client information can be any of the following:

- Financial data
- Pending mergers or patents
- Unreleased marketing or strategic plans
- New store locations
- Layoffs
- Reorganizations

There may also be individuals within the client's company that are on a need-to-know status. Avoid discussing confidential information at the client site if there is a risk of being overheard. After meetings, pick up all papers left on the conference table.

Tip #27: Balance Consulting Standards with Client Standards

Case Study:

The requirements review session did not go well for Robin. While meeting with client team members, Tim and Joan, the subject matter experts for the client, they focused more on the format of his document than the content. Robin was a stickler for detail, which made him an excellent business analyst in most cases. His firm's methodology provided a standard template for business requirements with sections for several scenarios and categories of information. He followed his firm's template to the letter.

Unfortunately, Tim and Joan were accustomed to their own format for business requirements. They had asked Robin to follow their format and had returned the document once before when their request had not been heeded. He made few changes, but stuck primarily to the original format.

"This is very disappointing Robin," Joan said. "We specifically asked you to modify the requirements to meet our needs."

"This is our firm's standard," he explained to them. "If you review the document you'll find that it has all the information you need."

His format explained redundant details for each scenario of their process which caused them to read through superfluous minutiae for each condition. If there was a change to one scenario, they had to make sure that the change was made for each one. They tried to explain this and the resulting

consequence that it cost them unnecessary time. He was adamant that this was the firm standard that they had paid for and he was unable to do it another way.

Most large consulting firms have their own methodologies, standards and templates in an effort to provide their clients a complete and consistent approach to their service. Flexibility needs to be followed to give the client what they want. There is no such thing as a *one size fits all* approach to consulting. Steps within a methodology may be inserted, removed or modified in some way that provides client satisfaction. Documentation templates may need to be modified to comply with client standards or expectations.

Consultants are engaged for their expertise. Their standards and methodologies help them provide a consistent and branded service. Sometimes, it allows them to work more efficiently. These tools should not get in the way of providing expertise to the client in the formats that they desire.

Tip #28: Comply with the Client's Work Schedule

Case Study:
Progressive Consulting Services was performing a 12-week strategy study at Lincoln Office Supplies. Although Lincoln followed a standard work day of 8:30AM to 4:30PM, the Progressive Consultants usually didn't arrive until 9:00AM. They almost always put in long days, staying well past 4:30PM.

The Lincoln employees noticed the consultants' late arrival, but didn't say much at first. As the project progressed, the consultants were working longer days, sometimes until 10:00PM. When this happened, they sometimes didn't come in the next day until 10:00AM. Even though they were working ten and 12-hour days, Lincoln's employees only saw them strolling in to work an hour and a half after their work day began

It didn't take long for the Lincoln employees to show their frustration and resentment. They would stop by the war room at 9:30AM to ask one of the consultants a question, only to find the room dark. They couldn't schedule a meeting before 10:00AM for fear that the consulting team wouldn't be in yet. One employee made a comment to the project manager about them coming in so late. He responded that they worked so late he let them sleep in a little. The client employee wondered whether they would have to work so late if they just came to work on time.

Most clients have within their culture a set of written or unwritten rules that their staff follows. One of them is when the work day starts. Some begin early, at 7:00 or 7:30AM, while others don't officially start until 8:30 or 9:00AM. Seeing consultants roll in after the client employees have been there for over two hours doesn't sit well in their efforts for acceptance. The client does not see how late you worked the previous evening. The client wants face time with their consultants. To maximize it:

- Learn the client's standard work hours and be there during those hours.
- Even when working late into the evening, consultants must be available for meetings or questions during the client's normal business hours.
- When running late, make sure to call a manager to let them know, and don't allow it to happen on a regular basis.
- Schedule meetings during their work schedule. Scheduling meetings late in the day or after they normally leave, even though you plan to be there, will generate resentment.

Tip #29: Represent the Firm in Every Client Encounter

Case Study:
Virginia had been working on a consulting project at Garfield Corp, Inc. for the past six months. They had just surpassed a major milestone and she had been working some pretty long days. Now that things had settled down she needed to let loose a little. On Saturday night she went clubbing in the city with a few of her friends. They had been out for several hours and around midnight, found themselves at Nitro, a popular nightclub. While there, she bumped into Alex, one of the employees at Garfield Corp. She and Alex had been in several meetings together during the project and knew each other fairly well. They chatted for a few minutes and he bought her a drink. The conversations evolved into the project and they began discussing the work environment at Garfield Corp.

Virginia had drank enough to lower her inhibitions a bit too much. She began sharing her opinion of some of Alex's co-workers. Some of her critiques were harsher than others and Alex was a little embarrassed by her assessment of his peers. Then she began discussing some of the internal politics at her firm. She revealed that she thought her project manager was a jerk and that she didn't think he was very experienced. After a while, Alex politely ended the conversation, saying that he needed to join his friends.

The next day, Virginia remembered meeting Alex, but didn't remember most of the conversation. On Monday, her PM called her into his office. He explained that it had been reported to him that she had bad-mouthed some of the client

employees. He told her that she was being removed from the project effective immediately and she was to report to the consulting office.

Virginia shakily packed up her personal items at her desk and returned to the office where she was given a lecture from the senior account manager on the potential harm she could have done to the firm by having such an indiscrete conversation with a client. News of her blunder got around the firm and it was difficult for her to get good project assignments in the future.

It can be common to develop loose lips when consultants bump into client personnel off-hours, or when they begin to develop a friendly relationship where they meet for lunch or drinks after work. Sometimes clients begin to share their company gossip and a consultant feels the need to reciprocate. Good judgment needs to prevail.

- Making disparaging comments about your firm or any of its employees hurts your firm's credibility. As a result, your credibility is also weakened.
- When clients begin to ask specific questions, digging for a little dirt, don't accommodate them. If they push hard, a response such as "I'm really not at liberty to discuss that kind of stuff" is appropriate.
- If clients begin to criticize members of their own organization allow them to speak, but resist the urge to join in. As much as you may agree, and as much as they don't seem to mind, a situation in the future could cause them to turn on you and reveal your criticisms to your management.

Tip #30: Keep Cool Under Pressure

Case Study:

The package selection project at a small manufacturing firm was on schedule. Two vendors had been invited to give product demos of their functionality to a selected group of users at the company. Lynn was the Project Manager for the consulting firm and Grace had assisted her in gathering requirements and using them to help pare down the list of vendors to the two that came for visits. After the half-day demo by the first vendor was complete, they felt it had gone well and went to meet with Wendy, the company's CFO and sponsor of the project.

As soon as they walked into her office, they could tell she was upset.

"Is there a problem, Wendy?" Lynn asked.

"Oh, you bet there's a problem," she replied excitedly. "I just got done talking to three of our directors that attended that demo and they're mad as hell. None of our major business requirements were shown in that demo. It looks like that vendor just showed their generic package to us without even making configuration changes to show how it would work for our requirements. You two were supposed to meet with them and make sure that they demonstrated functionality that would work for our requirements!"

Wendy was beginning to get louder and more upset. Lynn tried to settle her down. "Wendy, let's talk about the specific requirements that were missing from –"

"Don't interrupt me!" She yelled. "All you have done was shuffle papers around for this whole project and look where we are!"

Lynn was stunned. She knew Wendy could be emotional at times, but she had never seen her this upset. Wendy's last comment made her a little angry, but she could see that Wendy was taking out a lot of frustration on her and the firm. Lynn stopped and let her blow off some more steam before daring to say another word. When she did speak, she made sure to talk slowly and calmly and not pass any blame back to Wendy.

"I'm sorry the demo went wrong for you, but we want to make this right, Wendy. Can we go through the list of requirements and discuss how each one missed the mark?"

"Not a single one was discussed!" she bellowed.

"Well, let's go to the conference room and go through each one."

Lynn removed Wendy from her comfort zone by going to a neutral location. She also bought some time for her to cool down by the delay of moving the meeting. When they sat down and discussed it, Lynn learned that there were only three requirements that were misinterpreted by the vender that the directors were concerned about. Lynn suggested that they meet with the vendor to provide feedback on the requirements and ask them to provide a follow-up presentation to them and then to the three directors if the response was satisfactory. She also made a point to verify that the second vendor understood all of the requirements before their demo, which was scheduled later in the week.

Wendy had calmed down significantly and was a bit embarrassed by her outburst. She said she would schedule a

meeting with the directors to do a second review and thanked them for working out a solution.

Throughout the course of a project, despite the most detailed of plans, things go wrong. Based on the fees paid to consulting firms, clients sometimes have an expectation of perfection. Consultants also make good scapegoats when things go wrong. If the project sponsor is feeling heat, they may be likely to transfer that heat to the firm that is executing the project.

High tension and emotions can be contagious; one person gets upset and begins passing blame and the recipient ups the ante. In situations where clients get overly excited:

- Try to diffuse the situation, rather than shooting back blame or insults, speak calmly in order to calm them down.
- If possible, suggest a change of venue to a neutral location. They may feel an exaggerated sense of power in their own office. Moving them to a neutral conference room may calm them down.
- Get them to focus on rational issues. Determine their specific issues.
- Approach it with a problem solving attitude. Things may have gone wrong and mistakes may have been made, but the past can't be changed. Focus on what can be done to correct the situation.

Tip #31: Don't Flaunt Consulting Perks

Case Study:
HRS Consulting held their annual sales kickoff meeting the second week of January each year. This mandatory meeting for all managers and above was a three-day event in which the president presented the sales projections for the coming year and highlighted the successful projects from the past year for the Sales, Recruiting and Delivery teams. It culminated with a formal dinner, after which awards were handed out to the high achievers in the group, including President's Club, the award of a four day Caribbean vacation for all recipients who met or exceeded their sales and utilization numbers.

Parker's previous year was excellent. His three projects put his utilization numbers well above his target. He also worked on the proposals for two of those projects and that allowed him to meet his sales goal as well. He was full of pride standing up on the stage when his name was called for President's Club. Aruba, here I come.

In mid-March he and his wife went to President's Club with the rest of the award recipients, the president and his wife. They swam in the ocean, went parasailing, feasted like kings and thoroughly enjoyed themselves for four straight days. On the last day, his boss presented him with his bonus check representing the equivalent of three months of his salary. Parker was speechless.

They returned home late Sunday night and Parker needed to be back to work at the client site bright and early Monday morning. He did not have time to deposit his bonus

check so he stuck it in his computer bag and went to work with it intending to deposit it over his lunch hour. Once at work, he loaded pictures of the trip from his phone to his laptop and showed them to some of his team members in the war room. The team consisted of both consultants and client employees.

Later that day Parker was getting ready to go to lunch and pulled the bonus check out of his bag to take with him. He left it there while he ran to the bathroom. While he was gone, the client manager stepped in to ask Parker a question. He saw the pictures on Parker's screen saver and someone mentioned that it was from the trip he won from the firm. He looked on the desk and saw the amount on Parker's bonus check and was not sure to be more stunned at the amount, or that Parker had left it on the desk for everyone to see. He was going to remember this when the firm tried to raise their rates for their next project.

Consulting has its share of perks. The pay is often higher and there are bonuses and awards that often exceed what client employees receive. These are usually well-deserved benefits from a lot of hard work and long days. Clients often do not see the hard work as clearly as they see steep hourly rates they pay to the firms. The fact that the pay and benefits are deserved is irrelevant to most clients. That information is not the client's concern and should not be shared with them. Flaunting it in front of them, whether intentional or not, hurts the firm's negotiating power when it comes time to agree on the contract for the next project. It also reinforces the stereotype of a firm's aloofness in an environment where team building needs to be generated.

Consulting firms hire bright people directly out of college or with industry experience to help their clients solve business problems. In addition to business knowledge, new consultants also need to know skills such as: - Client relationship management - Expectation Setting - Effective communication - Selling consulting services - Successful career management techniques Consulting 101 provides you with 101 useful tips to optimize your professional performance and jump-start your consulting career for success.

Consulting 101: 101 Tips For Success in Consulting

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