Consultants and their clients. Highlights of a study of success factors in information consulting

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Curiosity on the part of two information services consultants : "What is it we do right? What qualities make us successful? What skills do we need to improve?" led to a qualitative study of the success factors that help consultants in their projects. Annie Joan Olesen spearheaded the effort, recruiting colleagues willing to be interviewed (in Europe, Canada, and the US). It soon became clear, that in addition, those who hire consultants - the clients - had interesting and very enlightening views, and the study progressed to include interviews with selected clients. Our findings were presented at the annual meeting of the Consulting Section of SLA's Leadership and Management Division in Toronto on 7 June 2005. This brief article points to some key observations we hope will be of value to our consultant colleagues and to those who may be contemplating a consulting career.

"We didn't hear about that in Library School"

When information services consultants - information professionals offering their clients assistance in a wide range of knowledge management and business intelligence challen-ges - get together, the conversation almost always turns to a common experience of having had to develop our "success factor skills" by trial-and-error rather than through formal education. Granted, the subspecialty of consulting is but a narrow slice of the entire library profession's range of pursuits, and typical library school curricula might have difficulty accommodating attention to it. Nevertheless, we felt it could be helpful to our existing colleagues and to those contemplating a move into consulting if we charted the skills that make for a happy relationship with clients. A plan was hatched and the study began.

Thanks to our consultant colleagues and the clients we interviewed, we came away with a set of very consistent observations and offer them below in hopes they may serve as food for thought for our colleagues.

Overriding theme: Technical skills are not enough

Naturally, anyone acting in a consulting capacity must be technically competent in the professional domain of the assignment. That is a non-issue - after all, it's difficult to imagine anyone offering to consult in an area outside his or her expertise. All our informants pointed, in one way or another, to the fact that (1)

a successful consulting assignment requires careful management of the interaction between client and consultant, and that (2) such management is often complex and challenging. A great deal of psychological insight, interpersonal dexterity and situational finesse is called for. Add to that the oft-lamented circumstance that clients are frequently unaware of the full range of services consultants can offer. Clients can't ask for what they can't imagine - so we must guess or tease out requirements they don't articulate. Similarly, some clients believe they need a particular service when in fact we can see another type of service would be better for them; we are in effect in a position of having to politely tell someone (who hasn't even signed a contract yet!) that he or she is mistaken. Delicate? You bet. But that is just the beginning.

The client relationship: Consultants speak
Below, we reflect the comments made by our colleagues cluster in three key categories: Attention to detail in the service agreement; ability to gauge client preferences in staff interaction; and sensitivity to emotional and political factors. We point to examples to illustrate the type of concerns voiced; the examples are not a comprehensive inventory.

The Service Agreement says WHAT, but does it say HOW? An Example
Naturally, any service agreement sets out what the consultant will deliver to the client. But what about the how? Much as we might privately cringe at spelling out in great detail just when and in what manner certain activities will take place, experience shows that it is vital to have great specificity. For the purposes of illustration, we focus here on the nature and frequency of communication with the client. As an example, any agreement with a client should in some way answer questions such as

(illustrations, not a complete list):

- How often will the consultant communicate directly (phone call, email, document submission) with the client?

- Is such communication driven by time schedules (daily, weekly) or by events (alerting the client when something has been achieved or when something unexpected has occurred)?

- To what degree does the client want us to handle independently minor matters arising during the project - as opposed to making noise when unforeseen events happen or surprising facts emerge? What defines a minor matter? In other words, how much closeness or distance does the client want to have regarding the project's day by day progress?

- How receptive is the client to new suggestions ("Now that we have discovered X, we see an opportunity to do Y.")?

Interacting with the Client's staff
Experienced consultants have many anecdotes to share in the area of staff dynamics. Often, such dynamics are associated with a disconnect between the client's intentions and the concerns of the client's staff. For example, the client may have the best intentions in calling on a consultant, but the staff may perceive our presence as an implicit criticism and therefore be reluctant to cooperate. If we fail to pay proper attention to such psychological aspects, we may well find that our project ultimately fails - not because of the quality of our work but because of unaddressed staff anxieties.

Questions here include:
- How well has the client prepared the

staff for the project? What can we do to help?

- How can we best learn about team dynamics that may have an impact on the outcome of our project? If we are not alerted directly to potential pitfalls, can simple observation in group meetings help us gauge such challenges?

- Are there (for example) individuals on staff who may, for whatever reason, feel wary about our work? How can we determine such a situation and bring about the requisite assurance?

- Suppose we pick up that one staff member is informally "steering" the input we receive from other staff? How do we factor group dynamics into our work?

- What do we do if, for example, we sense staff are reluctant to share some details we need to perform our work?

- Conversely, what do we do if staff share freely about (and expect us to solve) specific challenges that are not within the formal project scope? Do we risk being told to keep out of politics, or take the chance the client will welcome our out-of-scope contribution?

Dealing with Organizational Culture
Every organization larger than two persons has an organizational culture. To illustrate, we mention just a few elements: The behaviors that are encouraged and frowned upon; the rewards and "punishments" employees perceive; and the degree to which messages from senior management are backed up in action. In addition, we mention the matter of organizational practices in interpersonal communication.

Unless there have been previous dealings with a client, consultants walk "blindly" into the organizational culture. It is risky to make assumptions based on previous clients' culture as no two organizations share a culture type. It is important to be keenly observant:

- Is there an articulated or obliquely suggested disconnect between official enterprise policy and employee experience? If so, how will it affect our work? (Example: Official policy may dictate accuracy but day to day practice may emphasize speed.)

- How do employees tend to interact? Are their interpersonal relations regulated according to organizational structure, or is informal interaction the norm?

- How does the culture affect the way employees handle (external and internal) information? What does it imply for the recommendations we can make?

- What is the degree of informality and friendliness you can have with staff?

The selling of a consulting engagement: Clients speak
In the above, we have focused on the skills consultants need in order to succeed in delivering a positive result perceived as valuable - and worth the price - by the client. But there's more to the client relationship than that. Our client informants shed intriguing light on the process by which the engagement gets established. In other words, it's one thing to deliver top quality work … but how does that work come into being in the first place? It's not as if clients are standing in line, clamoring for our services.

The most striking take-away from the

client interviews was an observation that information consultants believe "good information and knowledge work is inherently desirable" … but clients may not. Clients are not convinced of the desirability of what we have to offer. In other words, we approach a potential business relationship from very different vantage points: On our part it's "Of course you want my services - it's just a matter of the details". On their part, it's "show me the business case for the investment".

We distill the to-the-point input from clients into some questions we could all benefit from pondering:

- If I survived until now, why do I need you?

- Can you substantially alter my bottom line?

- Can you produce evidence that you have substantially improved another client's operations and results?

- How are my customers going to experience a difference as a result of your work?

- How is my organization going to benefit in the long term from your services?

Needless to say, the sales process for consultants deserves a separate article. For now, we have learned about some key initial concerns.