Do More than Fix My Company

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Introduction

Some nerve . . . clients who expect more from consultants than that we fix their companies. They pay a fee, and expenses. That entitles them to a set of outcomes. These outcomes are usually tangible and often measurable. That should be enough, yes? . . . but . . . no . . . they want more.

Through my thirty years of management consulting, every client has had expectations on three levels. Collectively, these expectations typically sum to a whole lot more than delivering the deliverables. I believe that client expectations exist in these three categories:

1. Technical Competence
2. Professional Contribution
3. Personal Style

Perhaps you've already learned that clients expect more than what the fee has been paid to deliver. If so, you've made those expectations a natural part of your work mode, your client management strategies, and your firm's economics. Failure to do so will place you far behind the "full-value consultants" who do. In the unconscious bargain with clients, you want to be the consultant who delivers on all three levels, Technical, Professional, and Personal. When you do, you'll achieve a rare positioning: the consultant who "gets it done"; the consultant clients want to spend time with, and from whom they want their people to learn.

The full-value consultant generates sustainable competitive advantages and far higher retention and referral rates. This is a natural by-product of achieving that rare positioning. It results from meeting or exceeding the unexpressed client expectations in Technical Competence, Professional Contribution, and Personal Style.

In this article we explore typical client expectations and a few suggestions for exceeding them. I believe several common denominators exist, the first of which is this: clients have expectations in all three categories because that is their natural *risk-management strategy*. Most often, this risk-management strategy is unconscious, but it is there. What risk? The consultant's shortcomings in any of the three areas puts the hiring executive, or direct client, in jeopardy.

Your direct client has (a) spent money; (b) endorsed a performer unknown to others (you); (c) committed to delivering an end result by a deadline; and (d) dropped an interloper into the corporate cultural mix (you again). Together, these four elements create anxiety – in the direct client and in the people watching him/her, and in those who will be affected by the consultant. Anxiety, in turn, triggers self-protective behaviors by the client's peers, subordinates, and superiors. If you've consulted even a year, you've experienced these behaviors. They can be harmful to you and your efforts; they can be deadly to your client – and the client knows it. These behaviors (lack of cooperation, information hiding, delays, unavailability, expressed cynicism about the engagement or the consultant) may be harmful to the client's career health.

Ergo . . . your direct client is at risk when inviting in a consultant. Ironically, the risks do not diminish solely by the consultant's performance in the Technical Competence arena. In fact, sound performance there is easily undercut by failure to meet expectations in the other two areas: Professional Contribution and Personal Style. Effective consultants manage the three areas consciously and smoothly, and reap dividends as a result.

Technical Competence

The simplest of the three value categories, Technical Competence means delivering what we promised in return for the fee. The dry cleaner takes your $2.00 and promises to deliver a clean, pressed shirt by a certain date. Simple. Integrate two newly merged departments; facilitate a strategic planning retreat; design an incentive plan; execute a search; develop a training workshop. This basic quid pro quo doesn't require much discussion. This is *the business* – on the surface. This is what is visible and measurable. This is what the client pays for, right? Well, not quite.

For many consultants, life is grand when the engagement is that straightforward: "Give me the deliverables on time and I give you money and you leave town." Alas, the other two dimensions are usually present, though under the surface.

Professional Contribution

As consultants, we bring a wide range of professional skills and experiences that reach far beyond technical task accomplishment. Clients expect us to contribute these skills unselfishly, proactively, and at no added cost as we execute the engagement.

This is a reasonable expectation. We all have such expectations around the "professional behavior" of service workers. When you bring the car in for repair, you expect the Technical Competence to do the repairs; but you also likely expect the service people to return the car clean, on time, and at the promised price. You may expect them to teach you something in the process too, or you may expect some priority treatment if you're a regular, long-time customer.

Expectations of "Professional Contributions," layered on top of Technical Competence, are natural in every field. Do we understand what they are in the typical consulting engagement? Below are the expectations for Professional Contributions I've encountered most often. When I place myself inside the client's mind – to empathize – these are things they want to say:

"with me personally"

- *Coach me: help me succeed internally. I know you have knowledge I don't have. I may not want to ask for it directly, but you can find ways to give it to me without slicing and dicing my self-esteem. Your feedback could be helpful; I'm counting on you to find effective ways to give it to me, yet still preserve the working relationship we're supposed to have (i.e., I employ you; not the reverse).*

- *Whack that guy over there for me, would you? You're my hired gun, right? That guy gives me nothing but trouble. During the course of this engagement, I'm counting on you to put him through a vegematic. I'm clean, but he gets pureed, thanks to you.*

- *When we hit Main Street in Dodge City, I expect you to be my Bat Masterson: back my play regardless of what it is. After all, your first loyalty is to me, isn't it? Without me you wouldn't have this engagement. So let's not get into those war rooms and have you assessing the odds and the politics and then trying to choose a winning side. You're with me all the way, eh?* [By the way, we should never have to back a bad play on Main Street. If we're sufficiently savvy, we're able to prepare, rehearse, or stop the client before he "hurts himself."]

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- *Build me up: to peers, to subordinates, to superiors in particular. I don't want to hear later that you were grabbing all the credit, or spewing negatives about my dearth of contributions and low value to this project. Just the reverse, please. Be proactive, without seeming artificial, about vocalizing my praises to others. You don't have to invent something. I have good qualities. Share some limelight. I was smart enough to hire you, after all.*

"with my team"

- *Transfer some of your competencies please. Pull back the Wizard of Oz curtain once in a while. Don't make us forever dependent upon you. Execute with my team members and, in the process, raise their knowledge and skill levels. [Long-term, it will help your relationship with me, though it might cost you a project here and there when we get cocky. You know we're not likely to do it well, and we'll call for the cavalry – you – but that's a more likely call if you've shared unselfishly in trying to build our team's capabilities.] Give a person a fish, she eats for a day; teach her to fish, and she eats for a lifetime." Teach us to fish.*

[A client pursuing a growth-by-acquisitions strategy wanted help. We conducted as much of our work as we could on-site, with their people, to make our processes and thinking visible – to pull back the curtain. As the series of small acquisitions developed, they took on more of the direct process step responsibilities. Did it cost us some days with each succeeding one? Yes, but a dozen years later, they remain a steady client, with engagements in multiple areas, without us having to solicit more business. And in every acquisition event, we're still at the table]

- *And while you're at this competency-transfer stuff, get my people to feel good about what they're learning. Don't talk down to them; no patronizing; no trying to "pull rank" because you work directly with me. They should see you as a valuable, but easy-to-go-to source of learning. Can you do that?*

- *Help build the team; don't tear it down. There's enough conflict inside this organization already: don't be the source of more by creating frictions I'll have to grease after you're gone. Try to be the means of bringing people together around goals, challenges, and tasks; don't use those things to divide us up into warring factions so that you're the rallying point. No "divide-to-conquer" here please. Yes, when we're cohesive it means the consultant's seat is a bit hotter, with the accountability a bit higher. But sooner, rather than later, if you're creating divisions among us, we'll recognize that you are and we won't appreciate it.*

"with the organization"

- *Identify positive opportunities that have thus far gone unnoticed. Regardless of what you're actually assigned to, you are a trained professional, a skilled observer. This means to me that you will see things we haven't. You're supposed to bring a broad view, with wide experience. You're in and out of dozens of companies, perhaps even crossing dozens of industries. Will you point out the opportunities even if there's no follow-on engagement in it for you? You will see opportunities for sales growth, or process improvements, or people/role fits, or productivity gains, or new technology applications, or . . . or . . . or. Will you point them out readily? Will you bring to your role the professionalism to help us succeed in ways that may be beyond your charter? This is real value added.*

- *Help us stay current, and let us in on "secret stuff." You're all over the industry landscape. You find out things. Share them with us. No, nothing unethical or illegal – though if you slipped about something now and then, we won't tell; but more importantly, help us check that we're up-to-date with what's going on in the external environment.*

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If these are some of the common expectations and desires clients have around Professional Contributions, then the question is How? How to deliver on these.

Here are a few ideas to consider . . .

- Offer to conduct an "anatomy of" session. Do this at the end of an engagement, or at major milestones within an engagement. The intent: to look back at what has been accomplished, how, and with what resources, to learn – about process, roles, outcomes, etc.

- Answer the question, "What should we do differently going forward (or in the next engagement)?" This is about positioning yourself as a coach, a guide, someone to look to with trust. You will also learn something in the process: how have you been perceived, and how to be more effective with this group next time.

- When I lead these learning sessions, I do it at no additional cost; it is part of the project, and, of course, it's optional (no fee reduction if the client chooses not to do it). Some clients – in fact most – don't want to do it, but the offer makes an impact. This one powerful tool can address many of the expectations described above: being a coach, helping the client team learn, sharing your own knowledge, and transferring competencies.

- Schedule regular de-briefs with the client and put some of these "hidden expectations" on the table. Make them visible. Ask the client outright, "How is your team responding through this project? Anything I can do to help foster their learning, or a more positive climate?" Or try, "Could we spend a few minutes on our relationship . . . are you getting from me what you wanted and expected – beyond task accomplishment – say in terms of support, feedback, knowledge sharing, and so on?" You may get nothing at first – maybe even a blank stare, but you will have opened the door, and I guarantee you will have stepped a notch above the norm.

The add-on value services described above come "free," or should. You won't find them listed in the engagement letter or a contract. They are generally unstated, embedded in the client's expectations, which makes them even more powerful. Your ability to deliver these – effortlessly, seamlessly, transparently – yet still ensure the client knows you've done them is one valid test of a professional consultant.

Personal Style

Most clients are pragmatic: their consultant selection process rests primarily upon the Technical Competence question. Clients have too much at risk to do anything else. Now, if a relationship already exists from earlier engagements, then Professional Contribution comes into play as well. It becomes the next branch in the decision tree. However, these things being equal, Personal Style will carry the day.

I believe Personal Style becomes the equal of Technical Competence and Professional Contributions *once the engagement is underway*. This is because the client comes to see Technical and Professional contributions as natural and expected. This is akin to Herzberg's "Hygiene Factors," like compensation or supervision, in his study of what motivates high performers. If these work just right, all they do is help maintain average performance. They're neutral. People expect reasonable pay and quality supervision. Providing them is not, then, a source of true motivation; but failure to provide them is certainly de-motivating. The real bang comes from the true motivating factors, like achievement, recognition, and the nature of the work itself.

Similarly, clients expect to see Technical Competence and Professional Contributions. Meeting those expectations may satisfy the clients "hygiene needs," but they are not sufficiently motivating to sustain long-term relationships. The differential versus other consultants may well rest in the Personal Style arena.

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Again, clients hold a set of expectations in this arena. Usually unspoken, these expectations work like a report card. The client fills out the little sections mentally with each interaction; only you don't get to see it. The secret entries contribute mightily to the potential for follow-on work. Where clients will discuss with you issues related to the Technical and Professional arenas, here they do not. Personal Style embodies too much that is, well, personal. So as with that blind date that went sour, you'll find after the first engagement a series of ignored phone calls, or a few too many "No, we're going a different direction this time" comments. How many sour dates have you told directly, "I'm afraid the personal chemistry just doesn't work"?

What can you do? Well, beyond understanding the typical client expectations in this arena, perhaps not much. We can all make some adjustments, but Personal Style has far more to do with embedded personality and far less to do with learned behaviors. Popeye put it well when he said to Olive, "I am what I am, and dat's what I am!"

But before we just give up on this issue, let's try to understand the most common expectations and desires our clients hold:

- *Will you let me lay on your couch, vent, release, maybe even get some absolution or advice? It's just for a few minutes now and then, and I certainly don't want a bill for it. Just show me you know how to listen, how to empathize, and that you can actually provide some counsel now and then that has value. Are you the type of person who can do that? Without getting judgmental? Without making me feel small?*

- *Can you fit in appropriately? Can you speak to us in our language and relate to my people? Will you try to look the part, at the right level: don't make me apologize for a $16 bargain dress shirt, or at the other extreme, for your $2,000 suit.*

- *Read the environment. Read the people. Know how to position yourself. Make people feel comfortable at the personal level. We have enough natural tension around here as it is. Bring a personal style that reduces it, not intensifies it. I've brought you into "my house." Find a way for my "family members" – at least most of them – to feel comfortable around you.*

- *Be enjoyable to spend time with. We're going to be in "planes, trains, and automobiles" together. Don't force me to lie to you about "all those voice and e-mails I have to return tonight in the hotel room so I won't be able to meet you for dinner." I'd rather look forward to sitting across from you for dinner. Be engaging. Make the time together enjoyable, not just productive. Do you have any good stories? Can you make me laugh? Can I learn something from you?*

- *Can I trust you? Your occupational colleagues rank near the bottom in terms of "selfless devotion to client's interest first" (see Insurance and Auto Salespeople for worst-case examples). Be the exception. Be the person with personal ethics, integrity, a respectable value system. Though I might not want to myself, I'd like to know you're someone we could engage as a real business partner. Or are you just here to generate more partner income for your firm?*

Simple, huh? These are the common line items on the report card under the Personal Style heading. How much of who we really are can we change? Probably not a lot; but we can be aware that these things really do matter to the clients at the personal level. They aren't the deciding factors at the front end of the selection process; but they fast become future knock-out factors once the engagement is underway.

Technical Competence, Professional Contribution, and Personal Style: none of the three alone is sufficient for building a sustainable, independent consulting practice. But mastering all three will yield

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significant competitive advantages. The large firms try to stock their work teams with elements of each; but we independents have to bring it all.

About the Author

Harvey Bergholz is president of Jeslen Corporation, a consulting company he has headed for 25 years. His for profit clients range from small ($100 million) companies to multi-billion dollar global giants. His nonprofit clients include health care, religious, and educational institutions. His practice centers on providing senior executives with counsel and assistance in shaping and implementing large-scale, high-impact initiatives. Harvey also numbers among his clients some of the world's largest consulting firms. He may be reached by phone at (630) 455-9944 and by e-mail at Harvey@jeslen.com.

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