

lean & continuous improvement



Loving your Consultant

By David Weldon

Customer and consultant relationships can be as rocky and challenging as any marriage. But there are easy steps to making the partnership work.

Ask many executives what they think of consultants, and you'll hear a host of horror stories.

From tales of unkept promises, to inflated personalities, to failed projects, there are no shortages of reasons why executives find reasons to dislike consultants.

Like any partnership, managing the relationship between client and consultant takes hard work — on both sides. But for every failed relationship, there are countless successful and rewarding ones. And there are several steps you can take to make sure your consultant relationship is among the happy ones.

ExecDitigal asked two leading experts on client and consultant relationships for their views on what it takes to succeed — Sheryl Dawson, president of Dawson Consulting, a staffing consultancy based in Houston, Texas; and James Blumhardt, director of consultant relationships at Liberty Wire & Cable, a wiring and cable manufacturer for the electronics industry, based in Colorado.

Here is their advice on how to make the customer - consultant relationship a marriage made in heaven.

Makings of a rewarding relationship

Selecting the right consultant

Choosing the right consultant is as important as hiring the right employees, advises Sheryl Dawson.

She says the following are some key considerations when selecting and preparing a consultant:

Expectations – Be sure they are clear on your business needs and objectives.

Qualifications – Evaluate their level of expertise in the areas of your company's products or services.

Experience – Consider their previous experience and its relevance to your industry.

Personality – Weigh the chemistry between the consultant and key internal executives.

Quality – Review their references to gain a sense of the quality of their client relationships as well as the results they have achieved.

Ensuring a successful engagement

A successful engagement goes far beyond selecting the right consultant, since much depends on the partnership established to achieve the desired results, Sheryl Dawson notes. She says critical factors for the customer include:

Support – Make sure there is buy-in from top management for the project involved.

Communication – Constant communication is critical to ensure that objectives, milestones and measures of success are clear to all.

Respect – The internal project leader must be credible in the organization and have the proper authority and influence.

Vigilance – Be prepared for project scope changes and their implications on deliverables, time frame, outcomes and budget.

Verification – Make sure there is adequate documentation of the project's progress and results.

customers with **Credibility**



View from the consulting side

Dawson Consulting has been serving the Houston market for 25 years, offering expertise on executive level staffing, workplace management and training. Part of the Career Partners International network of 60 independent staffing firms, Dawson Consulting specializes in the energy, engineering, construction, and financial services sectors, but does work in other industries as well.

"We do mostly large company contracts," says Sheryl Dawson, president of the company. "We do executive coaching, succession planning, talent assessment, mentoring, leadership training and recruitment."

From Dawson's perspective, the primary reasons that client-consultant relationships fail are ones of personality or buy-in. And that doesn't automatically mean on the consultant's part. Often times, those assigned to work with a consultant are the culprit.

Dawson gives the examples of managers at a client site that really aren't committed to the relationship, or aren't high enough in the organization to make a project work. This can be a fatal misstep for the manager on the client side, if they have been paired with a consultant charged with grooming them for a new role.

"We have one recent experience where the coachee (a manager targeted for advancement) that we are working with. They were in agreement up front, but once the relationship started, they really wouldn't put in the time and effort that was needed."

In this manager's case, "they may not be able to make the changes they need to be successful, and they might be able to stay in the job."

A manager assigned to work with consultants needs a variety of skills to make the arrangement work. These include communications and so-called soft skills, as much as business and industry knowledge. Foremost among them is respect.

"Expertise is very important, but it goes beyond that. Personality is very important. And credibility within the company is most important," Dawson says. "We work with a wide range of people. If the person we are working with doesn't have credibility, it will hamper our efforts."

Beyond getting the client and consultant on the same page in their new relationship, Dawson also advises executives to be actively involved in overseeing the relationship, from start to finish.

"Buy-in from top management is vital. Without that, the relationship may not meet the expectations of the customer," Dawson says. "There needs to be a clear understanding of the objective — both by top management and by those assigned to work with the consultant."

It is important that both sides are aware any problems encountered in the relationship early on, and that they are addressed as quickly as they emerge, Dawson advises. "Know the missteps, and be in constant communication."

"Remaining involved in the consulting relationship to ensure that deliverables are achieved and there are no surprises is essential. Openness of the executive and key decision makers to new ideas and to hearing recommendations perhaps different from expectations, is one of the most important elements of a successful engagement," says Sheryl Dawson, president of Dawson Consulting

Consultants that communicate

Liberty Wire & Cable manufactures wiring and cable products used in a variety of electronics. The company is based in Colorado, but Director of Consultant Relationships James Blumhardt is located in Atlanta.

Blumhardt is responsible for building and managing the relationships with all consultants working with Liberty Wire & Cable, which includes approximately 950 consultants nationally. His role includes demonstrating all new products the company releases to the consultants, and training them in product use and sales. The company currently releases between 15 and 30 new products per year.

The hardest part of his job, Blumhardt says, is “staying in front of them.” By that, he means that consultants are generally high-energy and very busy people. Getting quality time with the consultants on a long-term basis has required that Blumhardt do his prep work – so that when he has a face-to-face, he can get immediately down to business, present his information quickly and clearly, and get out, as he likes to say.

In terms of personalities, Blumhardt says he has found consultants to be “all over the map.” But they all appreciate a few common elements.

“They appreciate you keeping them abreast of changes in the market, and solutions that will help them make their job easier,” Blumhardt says.

Some consultants also like to be wooed, Blumhardt says, while others can be quite hard to get. While some consultants like the attention of being wined and dined by a customer, others can take a lot of work to reach first base.

“Many consultants won’t respond to you on the first or second visit” Blumhardt advises. “It may take the third, fourth, or even more visits to develop a report.” That can be especially true when a manager doesn’t have frequent contact with the consultant.

Regardless of how often a customer and consultant have contact, Blumhardt says it is important to work on the partnership as a long-term relationship. More

View
from the
customer side



often that is done by the consultant, he notes, but it is a two-way street to success. And it can easily take two or three years before a client and consultant relationship is really comfortable on both sides.

Blumhardt advises customers to be candid and clear with a consultant on what the goals of a project or contract are, what the customer expects for deliverables, and how those deliverables will be measured. The customer should have constant and open channels of communication with the consultant, and should follow-up frequently on how the project or contract is meeting the customer’s business goals.

On the consultant’s side, Blumhardt advises consultants to develop industry and market knowledge that will help the customer, to have well rounded technical skills as they related to the customer’s operations, to be well organized, to be a good communicator, and — perhaps the most difficult of all to guarantee — to be well liked.

“Many consultants won’t respond to you on the first or second visit. It may take the third, fourth, or even more visits to develop a report,” advises James Blumhardt, director of Consultant Relationships of Liberty Wire & Cable