Managing client relationships

"The consulting process begins and ends with the client. However, it is all too easy (when faced with pressing deadlines and the need to generate revenue) to place greater emphasis on the area of problem resolution. However, it is imperative that you apply sufficient time and energy to understanding the person as well as the problem."

Mick Cope, The Seven Cs of Consulting

Invest up front and build rapport

You may be familiar with the term 'trusted adviser'. PCG first used this back in 2003 to demonstrate how consultants and contractors could move up the value chain with clients. Building an open and honest relationship with the client is the foundation of the assignment.

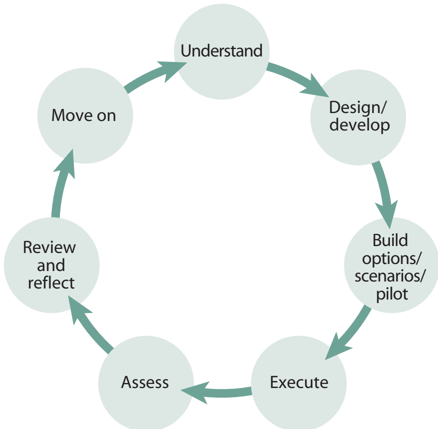
Typical objectives in the first phase might be to:

- Show understanding of the assignment objectives, needs, challenges and constraints
- Demonstrate that you can add value and insight to the project
- Show that you are easy to work with and can adapt your style to the culture of the client
- Discuss and understand how you will work with the prime client
- Show genuine interest in the consultancy assignment and achieving the desired change

Understand the brief

A consultant may be invited into a project at any stage and it is vital to be able to recognise and adapt your consultancy style to mirror the requirements.

A simple project process might involve the following phases:



During each of these stages, the consulting intervention is different. In the implementation phase, for example, it is not necessary to brainstorm creative ideas, and the client will be more impressed with delivery to plan and risk management.

"Recently, I was invited to join a project that was in its implementation phase. Whilst it would have been nice to go back and revisit some of the early development, we simply did not have time – this meant the focus of the team was purely around delivery to the plan and pulling together as a team."

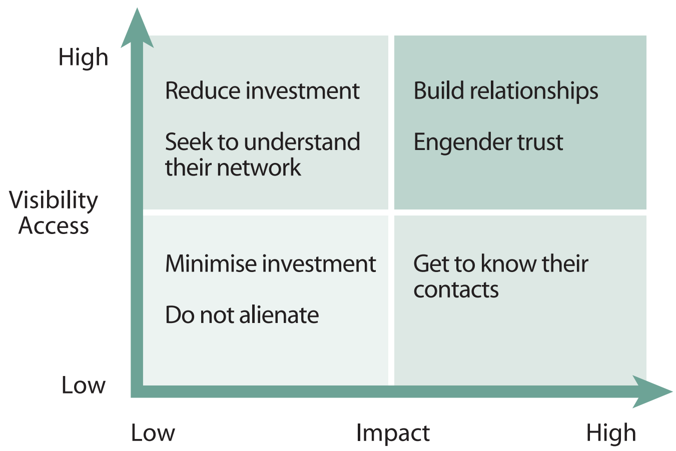
Diana Watson, marketing consultant

Other stakeholders

Most, if not all, consulting assignments involve working in a wide stakeholder environment with both internal and external parties. Understanding who is involved and their respective roles in the project will have a significant influence on your ability to manage the project successfully. You might be working with other consultants, with subsidiaries and other senior managers – they may all have a different view of the project and its impact on them.

Here are a couple of tips to help improve your understanding of these dynamics:

1. Ask your prime client early on to draw a organisational chart and mark relevant people who will be involved and, if appropriate, to facilitate the introduction. Do all the relevant people have a clear understanding of your brief?
2. Review impact versus visibility. Map the identified stakeholders against a 2x2 of visibility and impact and review this regularly as a project progresses.



Feedback

Time taken to review and provide feedback on the project itself presents a good opportunity to build the client–consultant relationship. This can be done at any stage of an assignment and helps to prevent any misunderstandings. Agree a separate time to do this and prepare your client with some prompted questions so they can spend time thinking about the project.

Some typical questions to share might include:

- What were your initial expectations of the project?
- Are you able to provide any particular reasons why you assigned the project to me?
- Do you have any comments on the extent, content and frequency of communication with you during the project?
- Are there any ways that the relationship could have been managed better for you?
- Did the project meet your expectations? If not, why not?
- Can you describe the value to the business gained from this work?
- Can you suggest any improvements that should be incorporated in the future?
- Would you be able/willing to act as a referee or provide a quote that I can use?