

Raising Client Confidence in Consulting Work

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Abstract

The following discussion will consider practices and processes that a client should adopt in order to raise their confidence in the value of consulting work they commission. The discussion will focus on key criteria to facilitate success, whilst recognising that these alone will not result in valuable consulting outputs. A defined client scope will first be considered before moving on to collaboration and resources, trust, consultant expertise and governance framework before concluding how these factors contribute to the delivery of a valuable consultancy project outcome.

Introduction

The following discussion will consider practices and processes that a client should adopt in order to raise their confidence in the value of consulting work they commission. The discussion will focus on key criteria to facilitate success, whilst recognising that these alone will not result in valuable consulting outputs. A defined client scope will first be considered before moving on to collaboration and resources, trust, consultant expertise and governance framework before concluding how these factors contribute to the delivery of a valuable consultancy project outcome.

Defined Scope

A clearly defined scope is crucial to the positive success of a consulting project as it provides a blueprint for the consultants' work and, written well, establishes clear expectations which can help ensure that a consultant offers a proposal of services which meet the client's needs.

Kubr suggests that it is not enough for the client to recognise that a consultancy service is required, they should "define the problem as he or she sees it, as precisely as possible" (2002, p.63). Burtonshaw-Gunn and Salameh summarise the three reasons that a consultancy service may be required as;

- Expertise and specialist skills which are not available within the organisation
- Objective appraisal from an outsider
- Additional temporary assistance to address workload

(2010, p.7)

Poufelt and Payne suggest that "more focused effort should be made by clients in defining the basis for an assignment" (1994, p.435). Rockwood discusses that Schein's models of helping can help clients and consultants understand if the help is required through understanding the content of the organizational problem (Expert and Doctor-Patient) or how the problems are to be solved (Process consultation) (1993, p.636). When the client takes the time to consider which helping model they need, this helps create a robust scope which is free of ambiguity. This can therefore allow the client and consultant to align on objectives, deliverables, ways of working, programme for delivery, and budget. Rockwood supports this stating that it is "important for the helper to understand what assumptions he or she brings to the helping process, because if these assumptions are erroneous, the helping process will be undermined" (1993, p.636).

Schein's process consultation theory emphasises active involvement in defining the scope and desired outcomes along with the co-creation of the project to directly address their needs. In this approach, the client is a key participant in defining the project's structure and goals, resulting in a shared understanding between client and consultant and alignment with organisational vision and priorities. This can help ensure valuable outcomes which meet the clients' expectations. Similarly, Haslam suggests that Newton's dimensions of a consulting engagement (client issue, consulting approach and scope of intervention) can help shape expectations of value along with defining clear project boundaries (2017, p.10).

Block suggests that the process of defining scope should begin with a contracting meeting in which the client identifies specific goals and outcomes and agrees on how they will work with the consultant (2023,p.71), aligning with Schein's theory, that this should not be a task assigned to the consultant but instead a collaborative exercise. McLachlin suggests that this "helps the client by forcing some clear thinking about promises and expectations and it helps the consultant to lower unrealistically high expectations so that service quality is positive" (1999, p.397). The involvement of other client representatives could be valuable in building commitment to achieving the project outcomes.

Culminating this thinking into a scope document can enhance communication as it forces the client to clarify objectives, outcomes, and non-negotiable elements. This should outline core requirements, assumptions, constraints - such as budget or available data - and specific methodologies they wish the consultant to use. This allows client-consultant dialogue to ensure desired outcomes can be achieved as well as the level of client participation required, with Poufelt and Payne finding that an awareness of expectations, roles, and potential contributions during each step in the consultancy project is necessary for success (1988, p.434).

Effectively defining the scope can provide further benefits to both the client and consultant; a full understanding of the scope enables a clear budget costing for undertaking the project along with a realistic timeframe for delivery to be identified. This in turn can help control scope creep or help the consultant identify potential opportunities for providing added value to the client.

Collaboration and Resources

Lambrechts et al. suggest that in the context of process consulting, "change is seen as a result of joint consultant-client analysing, diagnosing, and remediating" (2009, p.45). In this context, the client needs to be willing to commit time and resources to working with the consultant to reach this conclusion, as the organisation-specific knowledge needs to be shared and disseminated with the consultant to achieve organisation-specific results. This is likely to include allocating junior staff members to address and deliver upon data requests in a timescale that meets that of the project, in addition to the principal client allocating sufficient time to the project. Williams states that a "collaborative role involves providing advice, access and resources" (1987, p.11). Bronnenmayer et al. concur stating that "the client's input is essential to accomplish an appropriate solution for the respective problem" (2016, p.714).

Trust

Schein's work on process consultation identified that the helping relationship is characterized by reciprocity and trust (2009, p.11). Ben-Gal and Tzafir concur stating that "out of all influencing factors, the success of the consulting interaction is dependent upon the highest levels of trust" (2011, p.667). This is particularly so in Schein's Expert model whereby the client gives the consultant "power...[becoming]...dependent on what the consultant comes up with" (Lalonde and Adler, 2015, p.181). McLachlin's findings are that central to trust is the consultant's integrity in having a genuine desire to put the client's needs first (1999,

p.395), and likewise, Gen-Gal and Tzafir found that this would then be reciprocated with the greater the trust, the greater the client commitment to change (2011, p.673).

Bronnenmayer et al. disagree, however, with their study finding that trust is not realistic in client-consultant relationships. They concluded this due to prejudices that consultants are “overly self-confident and overpaid...establishing that trust between consultants and client is simply hard to implement” (2016, p.726). Respondents also indicated that the short-term nature of the projects provided insufficient time in which to build trust (2016,p.726). Block, however, suggests that you can begin to build trust through airing possible areas of mistrust (2023, p.27) and this may be enough to display sufficient levels of trust for the consultant to be considered for award of the project.

Brand image, ethics, and values are increasingly recognised as contributory factors in building trust rather than simply being cultivated through the interpersonal relationships between client and consultant. This is particularly important in an increasingly digital age where practices are represented on multiple social and professional platforms. The client should also be conscious of their brand and ethics, consultants are more conscious of who they partner with to avoid risks of negative publicity from working with clients with contentious practices or ethical stand points. Trust therefore needs to be considered both ways.

Consultant Expertise

Bronnenmayer et al. state that it “stands to reason” (2016, p.725) that consultant expertise will provide client confidence in delivery. Indeed, Ford suggests a principal reason for project failure is the client failing to undertake an appropriate screening process in selection (1974, p.8). A key consideration of the client should therefore be how they establish the level of expertise and whether it is appropriate to their needs prior to appointment.

Basic principles of selection could include requesting case studies, references, and demonstrating evidence of a previous track record in comparative projects. Ford states that the client should ensure that they check references and “verify the consultant’s claims to success” (1974, p.8). Structured interviews may also help identify the relevant experience of the consultant while simultaneously checking for a compatibility in personalities; the client should consider the likelihood of their teams cooperating and providing the relevant assistance, or if the consultant might ‘rub them the wrong way’. Applebaum and Steed state that “the consultants must be competent” (2005, p.77), and whilst there is little regulation and control within consultancy, reassurances could be gained by the client seeking consultants who have professional affiliations such as being an ICMI Certified Management Consultant (CMC) as this will indicate that they have basic competencies.

Governance Framework

A client governance framework helps provide a structure for design making, accountability, and ensuring that outputs are being reviewed against the initial consulting project objectives. Zwikael and Hueman suggest a benefits management process which helps provide mechanisms for control and ensure alignment and

opportunity measured against organisational strategic objectives (2023, p.3). Badewi found that organisations with a combined project and benefits management framework “are able to achieve significantly higher levels of success” (2016, p.775). Developing clearer governance procedures and establishing more consistent processes surrounding external consulting engagements were also found to be key to consultancy project success by Applebaum and Steed (2005, p.91).

A structured framework which provides “the templates and tools for decision-making, supply the apparatus for making effective decisions” (Badewi, 2022, p.133). This can help the client appropriately identify and manage risks and also possible changes. A framework can help prevent scope creep or ensure that there is an appropriate structure and methodology for reviewing and approving amendments to scope which are likely to have subsequent impacts on time and budget.

This governance procedure can therefore help both the client monitor and review the performance of the consultant, but also help give the consultant opportunities for client interaction on progress to help shape the progress of the project. Too and Weaver, warn however, that the “art of good governance is striking the right balance between restrictive processes...and the freedom to support effective growth and innovation” (2014,p.1391).

Conclusion

Whilst many would expect the responsibilities of a successful consultancy project to fall upon the consultant, this discussion has identified that success “depends primarily on what safeguards the client takes initially” (Ford, 1974, p.11). The paper identifies a clearly defined scope as the foundation for success and client confidence, aiding in problem identification, clarifying the needed assistance, along with determining measurable objectives and a programme for delivery. This helps manage both client and consultant expectations.

Running alongside this, collaboration and trust were found to be influential factors in ensuring success; the consultant cannot deliver their project effectively without client input and data, and this is more likely to be shared with the consultant if the client trusts them. Expertise was identified as crucial for client confidence, and several ways of establishing expertise were identified.

The paper finally outlines the necessity for a clear governance framework to help monitor progress in line with objectives and provide templates and control measures for potential changes to scope and budget.

Combined, these factors should help ensure that a valuable service is received which meets client expectations. However, Applebaum and Steed stress that the client must “have the organisational leverage to act on the consultant’s recommendations” (2005, p.75) for the true value of the consulting project to be realised.

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