



TenStep Supplemental Paper

1 February 2004

Consulting Fundamentals

Consultants spend a major part of their work time with their clients. They explain and demonstrate the complexities of the subject matter to clients. A consultant needs to be a master not only in the technical aspects of the subject, but also the professionalism that required when advising a client.

There are several other factors that have to be taken into consideration by a consultant. Good and poor advisors may be equally skilled in their subject matter. However, it is their ability to impart customized and personalized advice that makes a client understand the concepts and the solution. This improves the experience of the client and lays the groundwork for building a successful relationship.

Consultants should discuss the problem(s), evaluate and logically derive potential solutions, and finally, communicate effectively with the client. For a consultant who is skilled in this process, advising comes very easily and would not be thought of as a detached practice. However, a less skilled person may misunderstand the particular needs and problems of the client or may not be able to properly communicate their advice.

Here are a few guiding principles that should be followed by consultants.

- **Focus on the relationship.** Getting to know the client on a personal level will always help the consultant gauge what the client would like better, how they will respond to certain information, and how to present him with problems or solutions.
- **Customize your approach towards each client.** Few clients are very specific about their requirements and most are satisfied as long as their vague requirements are mostly met without any hassles. Clients and consultants should discuss the entire relationship so that the particular needs of each client can be understood and fulfilled.
- **Clearly define your role.** The client should be aware of the consultant's role in advising them and about any commitment between the consultant and the client. The consultant should also express his or her expectation that the client perform the basic tasks that are required to make the relationship successful.

It is possible that a misunderstanding between the client and the consultant will occur. Therefore, the terms and conditions should be made clear to the client and also the consultant before working on an assignment. The client needs to be made aware of the level of availability, access and disclosure he or she is committing to when negotiating the contract.

- **Visualize success.** The consultant has to help the client draw a realistic mental picture of the desired results. Doing this helps the consultant and the client plan and start the engagement. Failing to do this may result in a lack of coordination between the consultant and the client. On the other hand, setting goals and deciding on the course of action will be a strong motivational force for both the consultant and the client.



TenStep Supplemental Paper

The consultant must help the client visualize the end result right at the beginning of the assignment. This helps to prevent the client and the consultant from deterring from the necessary course of action.

- **You advise - they decide.** Consultants must stay away from getting emotionally involved with any idea while offering advice to the client. A consultant must always bear in mind that the client is the best person to judge an idea, as he or she is the person who deals directly with the organization and understand its complexities.

A few consultants may complain that the solution to the problem would be very simple if the client followed their ideas. That type of response is not going to get anywhere. If the consultant is convinced that the wrong alternative was chosen, they should do a better job of understanding the client needs, and a better job of communicating the value of their preferred solution.

- **Be oriented towards results.** A consultant has to understand that consulting is not just advising the clients but also assisting them in achieving their goals and end results. If possible, the consultant should assist the client in implementing the chosen ideas and solutions. The consultant should also prepare the client to deal with problems and issues, thus keeping the client's concentration focused towards the issue in question.

Summary

These principles provide consultants with an excellent base for building lasting advisory relationships with their clients in a manner that fosters trust and mutual respect, and that reduces the chances of misunderstandings and unrealistic expectations.