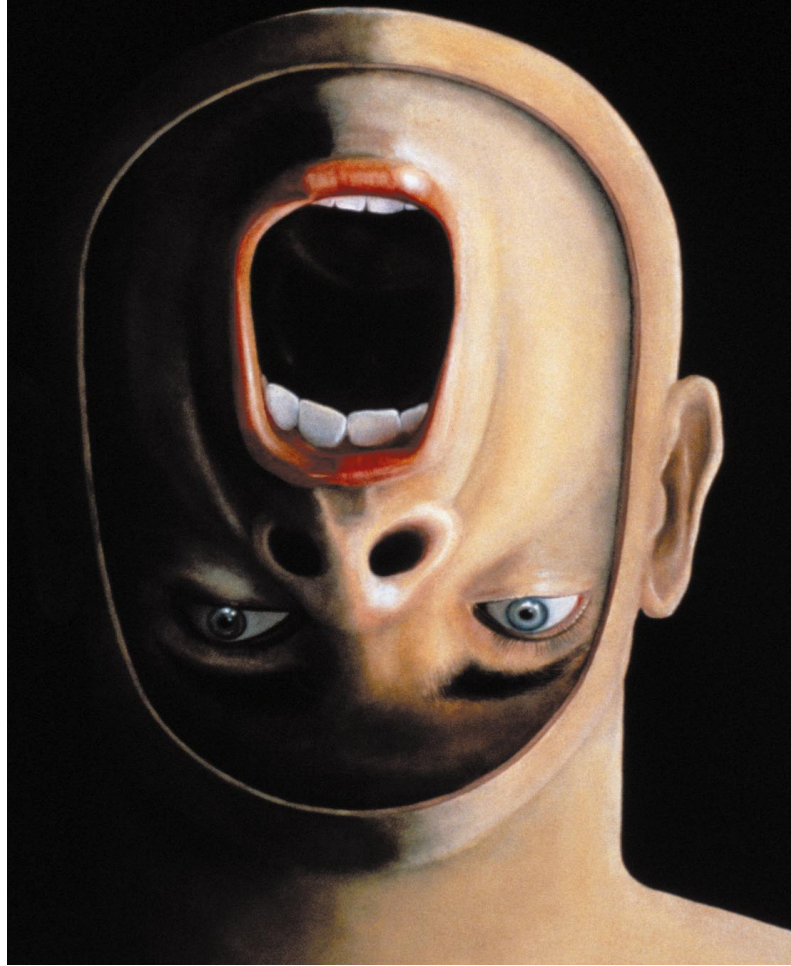


**build a solid
working
relationship
with your
consultants
based on
mutually
understood
objectives
and goals**



avoid project hell

by preparing
for a partnership
that works

by Drew Suss

Imagine you're two hours into a conference call involving all the consultants and corporate staff teamed up to produce a live event for 1,200 sales specialists. You're two months behind schedule. You haven't gotten far on today's agenda because one of the corporate staffers is reviewing the budget and wrangling with the executive producer over every nickel. That goes nowhere. Next it's the corporate producer's opportunity to be shocked that U.S. \$1,500 isn't the total cost for all speechwriting for all the presenters for each day of the event. One of your colleagues — the expert in media and meetings — demands that someone justify why it takes more than three or four hours to conceive, write, review, edit and polish the CEO's keynote address. And by the way, a committee will determine his message when they get time. The third draft of the production

(continued)

by doing the homework first, you'll be able to develop an accurate RFP, and early clarity improves later results

schedule is too tight, but there isn't any more time. The problems keep mounting and everybody realizes that this is the "project from hell."

With no way out, the corporate staffers are under the gun and the consultants are wondering whether to stay. It's an ugly situation, like a marriage gone bad. This story is true. The names have been changed to protect the innocent. Individual behaviors serve as a guide to "what not to do." Are you interested in avoiding a mess like this? Read on.

we love new projects...usually First let's agree that with the ongoing up-and-downsizing of corporations around the world, the need for solid corporate-consulting relationships is vital. And people often look on a new project with positive anticipation. It's an opportunity to help someone and do great work. There's a new set of issues to study, problems to solve and new relationships to build. In this case the project was a critically important employee meeting: The company had recently reorganized, sales force turnover was so high that securities analysts were asking about it and the company's stock price had been cut in half.

As important as this communication opportunity was, the corporate staff charged with managing it hadn't taken the preparatory steps essential to an effective working relationship with each other or their consultant-partners. The consultants hadn't taken a close look at their client's state of readiness.

are you ready? As a result of this project, the people on the corporate side may have learned that before thoughtfully selecting a consultant, they must put their house in order. People on the consulting side were reminded that they must decide early whether to flee, fight or flow. That is: leave, try to change a dysfunctional situation, or just grin and bear it.

Consultants who choose to live with a "dysfunctional project" must accept that they will pay an emotional and psychological, and even physical, toll that may extend to their families.

All parties must recognize that completing "Project Hell" will be difficult and may produce an unsatisfactory result. Sticking with it may damage reputations and create an

unbridgeable gap between consultant and client. Who gets blamed for the failure? Consultants are an easy target.

If you are on the consulting side, know that the world does not come to an end if you decide to leave a project or not to join a team. Handle it with crisp candor and if appropriate, offer a competent replacement.

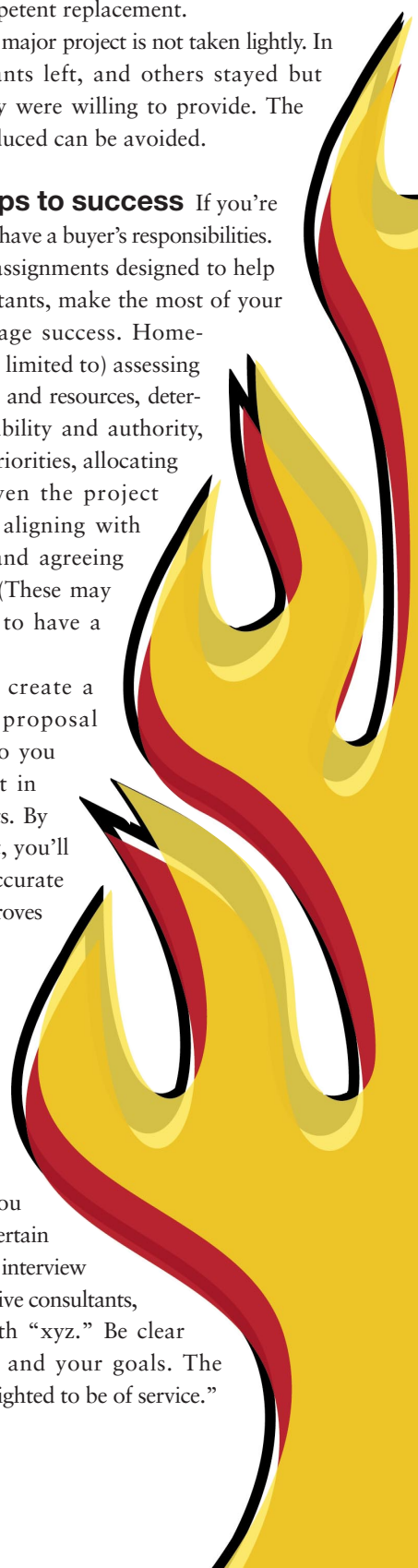
The decision to leave a major project is not taken lightly. In this case some consultants left, and others stayed but reduced the services they were willing to provide. The unhappiness all this produced can be avoided.


homework: 10 steps to success If you're on the corporate side, you have a buyer's responsibilities. Here are 10 homework assignments designed to help you retain skilled consultants, make the most of your investment and encourage success. Homework includes (but is not limited to) assessing your internal team's skills and resources, determining areas of responsibility and authority, setting budgets, setting priorities, allocating the right resources given the project demands and timeline, aligning with executive sponsorship and agreeing on the main objectives. (These may change, but you've got to have a starting place.)

You'll also want to create a definitive request for proposal (RFP) and plan ahead so you will have time to invest in selecting your consultants. By doing the homework first, you'll be able to develop an accurate RFP, and early clarity improves later results.

our top expert

When assessing internal resources, be candid about skills. Faking it may fool colleagues but only increases the potential for serious damage. If you find your team lacking certain skills, when you get to the interview stage, say to your prospective consultants, "We need your help with "xyz." Be clear about both your needs and your goals. The likely answer will be "Delighted to be of service."





Use the consultants' response to gauge chemistry, flexibility and creativity. Do they complement the skills and personalities on your team? Are they treating you as you want to be treated? Do they offer to explain things you asked about? Or (and it's important to ask yourself this) are "Web page programming," "staging," and "scenic design" (or whatever) specialties you don't want to learn about but just want done well?

listen carefully The answers you get from prospective consultants will help you decide whether they are people you can or can't trust, and as imprecise as the feeling of "trustworthiness" may be, success depends on it. Next, you have to ask your internal team the same question: "Do we have the expertise to partner effectively with this outside team to fulfill our company's mission?"

tug-of-war, anyone? Agreeing on critical areas of responsibility is part of assessing resources. Watching a client's political turf battle is disheartening and all too common. It reduces the functionality of the working group and can easily snowball into a time-eating, budget-escalating work stoppage. It may be an indicator of incompetence at the individual level or at worst a dysfunctional culture. Tom Kelsey, an experienced strategic consultant, notes, "Unfortunately, the person(s) most likely to spot this dysfunctionality are those outside of the culture, not those inside it." A good consultant is one who is driven to help people solve problems and create a better working environment. You can use a good consultant to help you spot and mend the problems in your culture.

If you're a consultant in a dysfunctional working group, brainstorm a list of potential actions and do whatever you can to avoid sputtering along. Kelsey notes one of the best things about being in this position: "You have the freedom to come from 'left

great cost-saving ideas come from all around the team, and the project budget belongs to everyone at the table

field,' to try changing things in dramatic ways, to offer suggestions that may sound crazy, but might just result in a healing process or at the very least, an improvement in the client's internal business. Don't be afraid to make the suggestion: "What if we could start over and redesign this business/department/issue from scratch? What would we do differently?" You, and your clients, may just be surprised at the results.

who's on first? what's on second? Having executive sponsorship in place can quickly eliminate a lot of wasteful wrangling. With a respected executive sponsor in place, resources may become more available. Setting priorities becomes achievable. Goals can be named. Equally essential is team alignment on the goals. And you may find that the team will re-align or bond better if it has clearly defined objectives, which may also drive resource decisions. Be clear and specific about the sponsor's responsibilities.

actually, it is your problem, buddy. Three words no one wants to hear from the executive sponsor or her representative are "That's your problem." That's what he said when the team was sitting at the table some weeks earlier and one of his colleagues raised a concern about the discrepancy between the size of the project and the size of the budget.

By saying those magic words he identified himself as someone who would avoid taking responsibility unless things turned out well, at which point he would be the first to take the credit. This is the wrong behavior model for a working group.

In the case study example, it was this manager's problem because it was his 1,200 people who needed the communication, motivation and training the event would deliver. These people drive the sales numbers that the analysts put under their microscopes. One of many possible correct responses is "I understand the problem. Let's brainstorm a list of things we can do." Great cost-saving ideas come from all around the team. And the project budget belongs to everyone at the table.

unintended messages? Since the junior manager couldn't single-handedly control the basic cost drivers, by saying those
(continued)

if you select the low bid, be sure you understand why it's the low bid

three words the senior manager put the onus on her to accomplish the impossible. He raised her anxiety level and encouraged her to micro-manage and “nickel-and-dime” consultants, sending a strong unintended, message: “We don’t trust you.”

When you’re asking a consultant to deliver her best efforts, it’s a bad idea to tell her you don’t trust her to bill fairly. It’s like saying “You may be a good surgeon, but until I’m satisfied otherwise, I’m assuming you’re a thief and a liar.” Distrust reduces efficiency and creativity. In my experience, confidence and trust are reciprocal. You’ve got to give it to get it.

how much? Money is always an issue. As the client, you must absolutely determine how much the corporation is willing to invest in the project. Be frank and honest with your consultants when they are in the ballpark and when they are not. Whatever the budget, you will likely find that some consultants or consulting firms can work within it. You seldom make great gains in productivity by hiding the real number and sending consultants on a fishing expedition to net what you’re willing to spend.

If you have no idea what things should cost, establish a spending target anyway. Then get three bids as part of your due diligence phase. If a member of the internal team is pretending to be an expert and misunderstands a cost element, the results can range from momentary embarrassment to career-limiting humiliation — like the \$1,500 for all the speechwriting. If a cost element isn’t clear, get an explanation.

specify the dimensions Drafting your RFP gives you the opportunity to do five things: 1) Confirm the resource and support decisions that you think you’ve already made; 2) define exactly what you want consultants to do; 3) create a template for bids; 4) make direct financial comparisons — apples to apples; and 5) plan for a contingency if/when the project scope changes.

Solicit advice. Think the RFP through carefully. Test it with potential vendors.

the beauty contest If you don’t know whom you want to bid, organize a “beauty contest” sans

the bathing suit competition. Interview a handful of companies to get a sense of the capabilities and cultures. Ask them what they have charged clients for other projects of a similar scope and size. If the companies you bring to the discussion feel the playing field is relatively level, they’ll be willing to give you a bid. Know also that creating bids is time consuming and expensive. The cost of the proposal will be embedded in the budget of the company you choose to work with. The more you are willing to be candid and partner with your vendors, the better the ultimate value.

The beauty contest also offers the opportunity to communicate expectations. Maybe one committee member thinks the supplier should be a subject matter expert, another thinks it should be an event producer, and another thinks it should be a process change consultant. You can have one of each in the beauty contest.

Be prepared to give all the consultants equal access to the information they’ll need in preparing a bid. By thoughtfully drafting your RFP, you’ll be able to compare deliverables, fees and charges. If you select the low bid, be sure you understand why it’s the low bid.

diligence pays Be diligent in your due diligence. When you speak with the references, be candid. How long have they been doing business with the consultant? How can you best use their talents? How can you save money? Can they advise you on a specific concern?

If you’ve got an important project and you lack established relationships with the resources to execute it, let me assure you, this effort will pay dividends. It will enable you to avoid project hell by building the basis for a solid working relationship with your consultant based on mutually understood objectives and goals. Had it been done in our case study, it would have saved time and effort, reduced stress, uncovered financial issues before they became problems and enabled money-saving decisions when there was time to make them. Do your homework well and you increase the probability that colleagues will point to your team as the people who get things done.

Take all these steps and it’s likely that you and your consultants will have a productive relationship that carries forward from project to project so that you can get more things done with less effort and greater enjoyment. The only time people will have that “let down” feeling is when an exciting, well-done project draws to a close. Then you can look forward to the next project.

Drew Suss is a writer and communication consultant based in Chicago. He can be contacted at drewsuss@aol.com.

