

Communication for Consultants

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Introduction

Why This Book?

Consultants in any practice need excellent communication skills or they will fail. There is no question that the most important skill for a consultant is to be able to communicate clearly and effectively. Of course, it is important to be able to manage people and projects, to be able to oversee technology and its implementation, and to drive change, but success with any of these is based on solid communication. The goal of this book is to help consultants and would-be consultants focus on effective communication methodologies that support their own success and that of their clients.

The very nature of being a consultant puts us in the role of an expert. As a consultant we take on the role of someone whom others look to. We give advice, we give direction, we give approval, we make change, we correct problems, we forge new direction, we alter the past, and we make way for the future. In some respects, we set ourselves up to be people whom others want to emulate. We are in the position to sell services, projects, and ideas; we lead projects, troubleshoot, mediate, manage, and direct. Our roles are so diverse, and we balance all of this interaction with both internal and external clients and colleagues. The only way to meet these varied expectations is through excellent business communication.

Of course, we all know that much of a consultant's output is in writing or oral presentations, and this output is exactly what the client is paying us for. We produce the blueprint. That is our product. It needs to be accurate, clear, and precise. And while this might sound obvious, it is often overlooked as a priority because of our competing demands during an engagement. Beyond this, intercultural and remote communications have increased our challenges exponentially; so, we should carefully reflect on our skills.

The key characteristic of excellent business writing is to focus on the relationship with the audience and its needs. Yet, in a consulting situation,

that audience role and relationship continues to change and morph as a project develops. For example, the manager to whom we may initially sell consulting services might become the key partner with whom we work very closely to mobilize our own team and perhaps that of the manager. So, we first walk in as a stranger and very quickly turn into the colleague, yet this does not change our relationship with the people to whom we are writing or presenting. Relationships are a key area we explore in this text.

Most great consultants are successful not only because they are talented and insightful but also because they use good judgment. They know how to manage professional relationships, be discreet, and still be collegial with a client. The knack of balancing multiple roles throughout an engagement and being able to communicate professionally is tricky and deserves our careful examination.

Audience needs dictate our communication. They control our tone, our format, the length of our piece, what information we include and exclude, what medium we use, and even how we send or deliver our message. In this text we explore a variety of business communication strategies and outputs that we typically develop for our clients during an engagement's lifecycle. We do this with an eye on the shifting relationship with our audience and how it controls and influences what we write and present.

Who Will Benefit from This Book?

Whether you are already consulting and stepping inside of someone else's territory or aspiring to do that, this book is for you. It provides information and methodology to help you become more successful as an independent consultant or as a consultant working for a large firm. The material is also relevant for professionals who have an internal consulting role within their company or institution. Whether you're in school and considering a consulting career or you've been consulting for many years, the information and methodology here will help you become more successful.

Much of what we discuss applies to all professional workplace communication. However, this book especially focuses on those engagements where we enter a client's workspace in a very intimate way and become part of that client's family. We will explore ways to avoid pitfalls and

to deliver an effective, clear, and appropriate message throughout an engagement.

In school we learn to write or present for one audience—a teacher or professor. Of course that person knows our material, sometimes even better than we do. We rarely learn to write to a client, employee, or senior manager, let alone to one of these with a particular need related to what we have to say. That might include, for example, the disgruntled client, the employee we're trying to retain, or the misinformed senior manager. Yet, as consultants these varying client situations make up the audiences with whom we must communicate in order to succeed.

What's in the Book?

You will find much practical advice for someone beginning a consulting career or brushing up after many engagements. The book covers a variety of communication forms, but especially those in written form. It provides scenarios and examples organized around communication challenges that you're likely to encounter before, during, and after an engagement. We will dissect standard professional services engagements and their deliverables as consultants encounter them. And we will look at many of the deliverables and provide practical examples for those who consult. We will explore business communication with the unique view of the shifting client relationship throughout the pre-engagement, engagement, and post-engagement phases.

CHAPTER 1

Key Considerations for Consultants

You and Your Audience

The Uniqueness of Communicating as a Consultant

When we enter a new consulting engagement, our audience—our client, welcomes us; but there is also natural tension in this relationship. Our clients or key stakeholders are the internals and we are the externals, the consultants. As mentioned in the introduction of this text, the relationship among consultants and clients evolves over time. We hope this happens in a positive way, but sometimes it does not. How does communication impact our relationship development? Well, communication is literally “our word” and the client will go back to that word over and over again. In the best scenario we go back to documentation to ensure that the work after an engagement follows the original mission or vision. In the worst scenario, the documentation becomes the detail that we may dispute once the engagement is over.

Effective communication is important throughout business. It’s the basis upon which we conduct business. We don’t communicate for entertainment or self-aggrandizement. For consultants, exceptional communication must be the standard. Anything a consultant writes or presents becomes part of the contract deliverable. It determines whether a relationship, a project, or an engagement succeeds or fails. It is not to be taken lightly.

Recently I spoke to a partner at a large consulting firm, and he shared an example illustrating how communications can go especially wrong for

CHAPTER 2

Pre-Engagement Communication

In this chapter, we will explore the first of three phases that make up a consulting engagement. The pre-engagement phase of a project typically runs from an initial inquiry through contract completion. In this chapter we will:

- review types of communication during this phase,
- detail the environment from both a consultant and a client's perspective,
- discuss good listening during pre-engagement phase, and
- illustrate best approaches to essential communications during this phase.

The Pre-Engagement Phase

While all consultants are directly involved in the engagement phase of a project, many contribute during the pre-engagement phase. This is especially true for small business consultants who manage all aspects of their client relationships. Whether actively involved in the communication or just by-standing, a consultant does well to know about all communication that will ultimately impact the actual engagement.

The pre-engagement phase is the period when your company introduces itself and begins to conduct business with a client. The relationship is established or re-kindled, and all parties seek to establish the ground rules for engagement. Most of your communication focuses on the documents and presentations necessary to start up the project. The communication tends to be more formal and detailed in this phase as everyone is learning how to interact with one another and to understand the work at hand.

CHAPTER 3

Engagement Communication

We've explored the communications that consultants encounter as they approach an engagement. In this chapter, we will turn our attention to the actual engagement, that period extending from when the contract is signed through the project completion. In our discussion, we will:

- review types of communication during this phase,
- detail the environment from both a consultant and a client's perspective,
- discuss key communication considerations during this phase,
- highlight advice for new consultants,
- illustrate best approaches to essential communications during this phase, and
- provide tips for writing and presenting engagement communications.

The Engagement Phase

The engagement phase is the period when the action begins for a consultant. You not only contribute to communications during the engagement but also often own them. As part of the consultant role you, of course, not only communicate quite a bit yourself but also coordinate much of the communication within the project. A multitude of tasks and people are swirling around during an engagement, and managing the communication output can be a significant challenge. As a consultant, you will need to keep focused on all materials created since these make up the project's official documentation.

Engagements can run from one day to many years. During this period, much of the work is organized around agree-upon milestones, deliverables, and outputs. Correspondences, reports, presentations, and

CHAPTER 4

Post-Engagement Communication

In this chapter, we turn our attention to the post-engagement phase and what a consultant's role is in communications during this period. Post-engagement begins as soon as the final contractual obligations are completed, and it goes on as long as the consulting services firm and the client interact.

Here we will:

- review types of communication during this phase,
- detail the environment from both a consultant and a client's perspective,
- analyze the audience during post-engagement and essential communications, and
- consider tips for writing and presenting post-engagement communications.

The Post-Engagement Phase

Just as in the pre-engagement phase, a consultant moves to the sidelines during post-engagement. The work of the project is done, and account managers typically take the lead in following up with the client on any next steps. As we have seen in the pre-engagement phase, effective consultants are wise to follow what transpires after an engagement and may contribute to presentations and reports.

The post-engagement phase is the period when your company completes an engagement. Relationships change yet again as working teams separate, clients or teams return to their full-time jobs, and consultants are redeployed to other projects. There is a natural and necessary parting