



**ENGAGING YOUR CLIENT  
IN THE PROFESSIONAL CONSULTING PROCESS**

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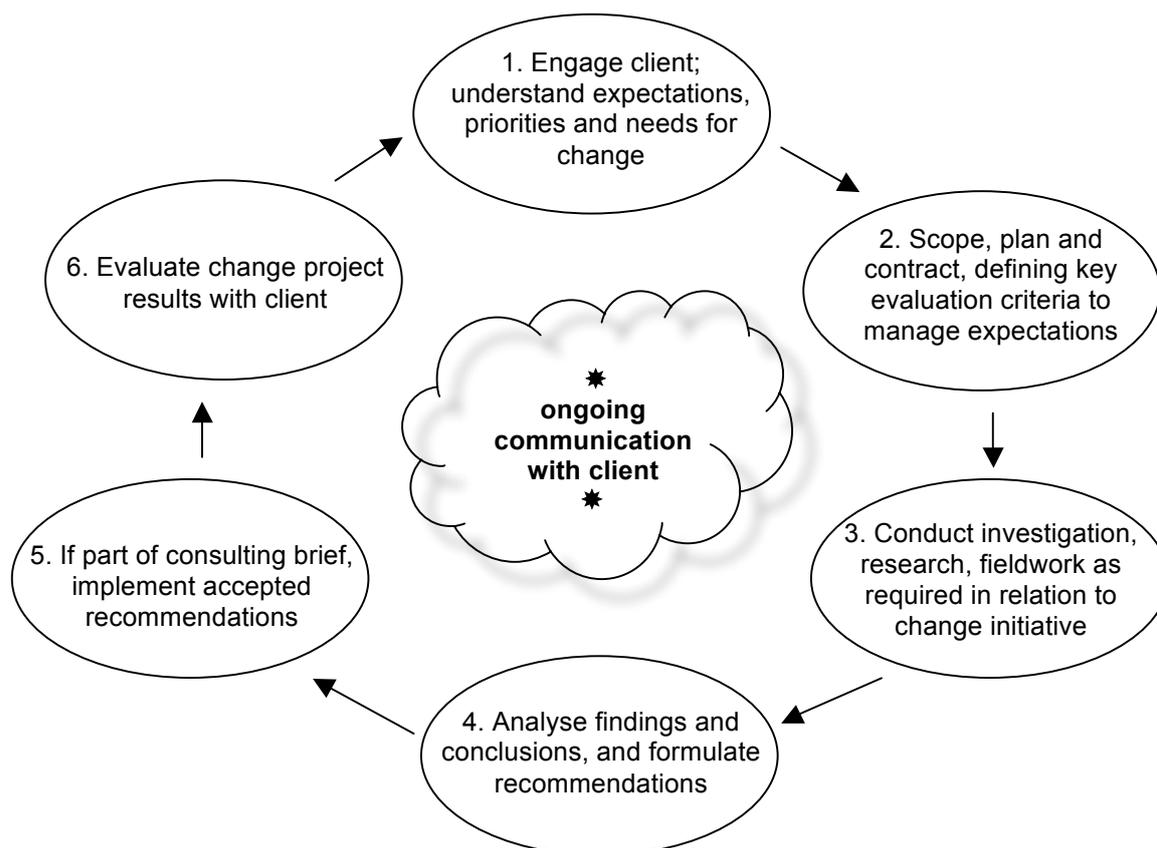
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While consultants come in many forms, and are used to address many needs, a useful generic definition of the professional consultant is that it is someone who uses their experience and expertise to facilitate the bringing about of a client-requested change in an organisation, without having functional authority or accountability in that part of the organisation that needs to change.

Whether you are a specialist in a service role needing to consult internally with the line managers in your organisation, or an external consultant providing your services to other client organisations, the same core set of principles apply to engaging your client through an iterative consulting process, or cycle.

The notion of a consulting process or cycle highlights the primary need for the consultant to manage a journey of change for the client. Ideally, the consulting 'change journey' starts with the establishment of a trusting client relationship linked to a good understanding of the clients requirements, and ends with the delivery of the necessary change, while successfully managing the client's expectations. This end point can effectively be a new start point where the consultant once again engages with the client to identify the next set of change requirements. An example of this ongoing, iterative consulting process is illustrated in Figure 1, below.



**Figure 1: Consulting process – an iterative cycle**

The advantage of seeing the practice of consulting in terms of a process or cycle is that it highlights the important actions and activities that the consultant needs to take at different stages of a consulting intervention. At the centre of the consulting process is the relationship between the consultant and the client. This relationship is strengthened when the consultant manages client expectations through ongoing communication and through establishing a set of evaluation criteria that provide both the client and the consultant with regular feedback on project progress.

While the consultant needs to possess and apply the necessary technical and specialist skills to engage in steps 3 (investigate), 4 (analyse and recommend) and 5 (implement) of the consulting process (as outlined in Figure 1), the success of the process and the reputation of the consultant is most often determined by how well steps 1 (engaging the client), 2 (scoping and contracting) and 6 (evaluating the project) are managed. These latter

activities are about managing client expectations, monitoring the morale and buy-in of the participating parties, and providing important inputs to keep the change process on track and within scope.

Evaluation criteria may be:

- 1) quantitative (calculated efficiencies) and qualitative (level of commitment or happiness with the initiated change);
- 2) focused on process (how the change initiative is being conducted) and on content (what data and insights are being derived); as well as
- 3) internally orientated (staff response) and externally orientated (customer response).

Importantly, evaluation criteria should be defined and agreed upon at the start of any change initiative, and evaluations should take place on a regular basis throughout the duration of the consulting project.

Professional consultants can play many roles to assist organisations and their people to develop, grow and bring about necessary change. The consultant may be a strategic advisor, a mentor, or a hands-on technical expert, and the best consultants know which role is best suited to address the client need at any point in time, and how to go about changing gear (or consulting staff) to align with the dominant client need.

A number of variables can be applied to determine the most appropriate consulting role. Included in these are 1) a focus on client growth versus a focus on project results, and 2) the level of intervention by the consultant, from low to high. A good representation of consulting roles can be derived from the consulting role grid, developed by Champion et al (1985), which is represented in Figure 2. The key to success for the consultant is to know when to change role to best serve the needs of the client and the organisation.

When the organisation does not have the necessary skills and direction, a higher intervention consulting role or style will be more appropriate. For example, the consultant may take on the role of Partner, with the underlying understanding between the consultant and the client that the consultant will be an active player both in delivery and in helping the client learn and grow.

Conversely, when the organisation is well established, with developed skills and processes, a lower intervention style applied by the consultant may give the client more scope to shape the way forward. In this situation, the consultant may take on the role of the Reflective Observer or Technical Advisor. The client does the work needed to bring about change, and the consultant answers questions when they are asked by the client.

For those clients who have some of the skills and abilities to manage the challenge of change, a moderate intervention style of Teacher or Counsellor may serve best. The consultant then needs to both encourage ongoing capability development while still assisting in the delivery of the necessary change in a timely manner.

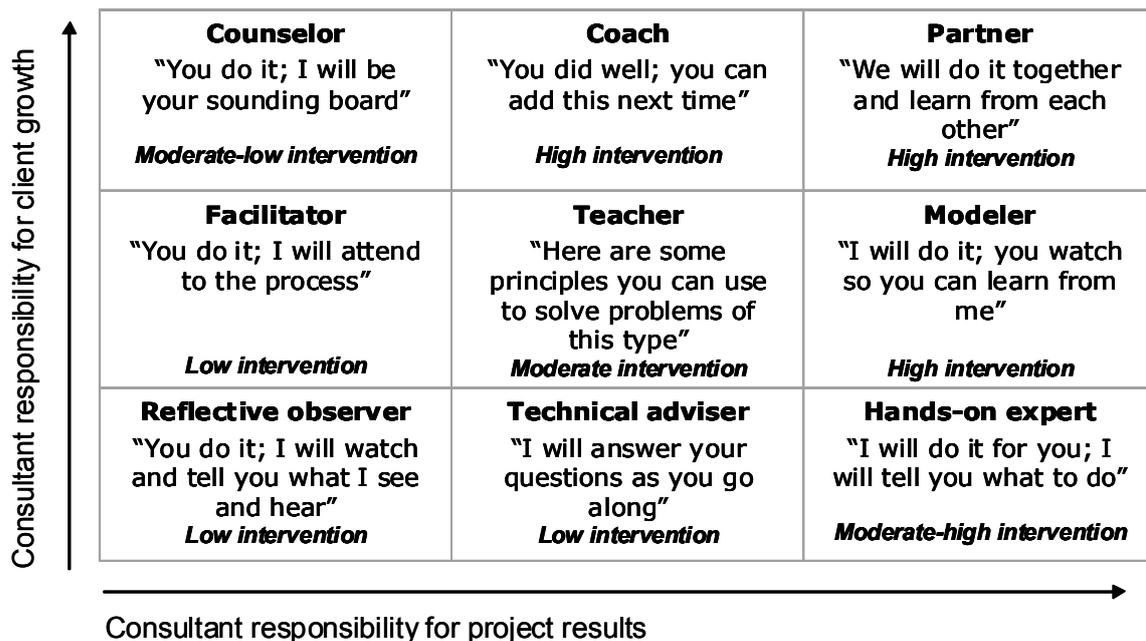


Figure 2: Consulting role grid (Champion, Kiel & McLendon)

An additional consulting consideration concerns communication style. What communication style is likely to be most suitable at each point in the consulting process? Blake & Mouton (1983) recommend four possible styles that may be useful at different points in a consulting intervention, as follows:

- 1) An 'acceptant' style: The consultant is empathic, listens actively and objectively, and provides emotional support.
- 2) A 'catalytic' style: The consultant gathers and analyses data, to help the client make a decision between various possible options.
- 3) A 'confrontational' style: The consultant highlights areas where the client holds a mistaken belief about the way the organisation operates.
- 4) A 'prescriptive' style: The consultant gathers and analyses information, and presents the client with recommendations or solution.

Each of these consulting styles, along with a number of other possible options for communicating with the client, has advantages and disadvantages. In choosing the most appropriate style to deploy, the consultant must consider who the client is, what specific problem or need is being addressed, and whether the advantages of the style being deployed outweighs any disadvantages, in order to achieve the best, lasting outcome.

A further consideration for the professional consultant concerns the key values and outcomes that may be important for the client when choosing to initiate a consulting intervention. Miller et al (1999) describe four client 'buying' types when contracting a consultant, as follows:

- 1) The Economic Buyer, who is most concerned about the return on the consulting investment;
- 2) The User Buyer, who is most concerned about the impact of the consulting intervention on staff and the operating environment;
- 3) The Technical Buyer, who focuses on the technical expertise and experience of the consultant; and

- 4) The Coach, who is a supporter of the consultant, and is most concerned with partnering together to achieve the necessary change outcome.

When engaging your client, whether you are an internal or external consultant, do consider the value of the consulting process, your consulting role and style, and the dominant values and outcomes held by your client. These perspectives can make a measurable difference to your success or failure as a professional consultant.

### About the author

Dr Grant Sieff is CEO of the IC Growth Group, a research, strategy and leadership development consultancy. He teaches at leading business schools as a visiting professor and senior lecturer. Grant has worked as a vice-president for Citibank in Australia and a partner for Accenture. He consults to leaders at the top levels of organisations across African continent and abroad.

IC Growth Group ([icgrowth.co.za](http://icgrowth.co.za)) has initiated an Africa-based research, market insight and strategy development online portal, dedicated to development and growth in Africa ([africamarketinsight.co.za](http://africamarketinsight.co.za)). Grant can be contacted at [grant@icgrowth.co.za](mailto:grant@icgrowth.co.za) or on +2721 462 7902.