

# The It Consultant

## A Commonsense Framework for Managing the Client Relationship

**Rick Freedman**

### Chapter Two

#### The IT Consulting Skill Set

*"Never fear the want of business. A man who qualifies himself well for his calling never fails of employment."*-- Thomas Jefferson

What do we sell when we sell consulting? We may be selling technical skill, a project implementation, or a report comparing different technical options. For any consultant who has worked for a professional services firm, there's no question what the product is: Like a lawyer or an accountant, we're selling billable hours. When it comes to the profit-and-loss statement, the consultant's ability to sell enough billable hours to be profitable is, literally, the bottom line. In every management meeting at consulting firms worldwide, as the partners review results and make forecasts, the conversation inevitably turns to the utilization rates of the staff.

Among managing partners and team leaders, it is an axiom that some individuals are consistently able to keep their billable utilization high, while others, often with similar technical skills, can never seem to achieve their targets. Some consultants are so well-trusted that clients will wait for them to become available, even though other, similarly trained practitioners are unengaged. In some cases, clients will schedule their internal projects based on the availability of a particular consultant, or will actually kick off projects ahead of schedule rather than risk losing a certain consultant's services to another client.

What are the characteristics that allow some consultants to remain highly utilized, while others struggle month after month to meet their targets? As with most questions concerning the profession of consulting, a view from the client's chair is instructive. As we have done before in this book, let's gaze out from the point of view of a client we all can identify with, a doctor's patient.

Patients are typically not medical experts. They usually cannot judge, except by results, the quality of the medical advice they receive. As patients, we assume that the diplomas and board certifications hanging on the doctors' walls assure us that they are qualified to practice. Patients can, however, judge certain other attributes that doctors bring to the relationship. Because of the patients' lack of expertise with which to judge the doctors' technical mastery, these attributes often take on added weight in our evaluation process. These qualities are sometimes referred to as "bedside manner." We may not be able to define this precisely, but "We know it when we see it." It's typically a combination of personality, communication skills, qualities of empathy and caring, and a holistic approach—a focus on treating the patient rather than the disease.

This analogy to a doctor's bedside manner gives us some guidance about the qualities clients look for in an advisor. Obviously, technical expertise is a deciding factor. Without

it the practitioner is clearly out of the running. The ability to communicate effectively is also key in both the doctor/patient and the consultant/client relationship. The doctor, or the consultant, who cannot ask the right questions, listen effectively to the responses, interpret what is said, and develop a dialogue based on trust is severely limited in the ability to diagnose and prescribe. The holistic approach in medicine is analogous to a business-centered approach in IT consulting. The consultant who focuses on the technological symptoms, without considering the business context, is in danger of offering a prescription that will never be filled.

Project management, like consulting, was once thought to be unteachable. One of the proverbs in the early days of project management was the idea that project managers are born, not made, and that success as a project manager was driven by personality, not methodology. Proponents of this school of thought stated that "You can't teach someone to ask the right questions, to resist scope changes, to be firm, to analyze the client's situation and come up with meaningful solutions, to estimate," etc. This opinion stands in sharp contrast to the disciplines and training that are now available for aspiring project managers. Organizations like the Project Management Institute and its "Project Management Body of Knowledge" and Project Management Professional certifications have shown that project management is in fact a system of thought and practice.

Certain character traits are important in the aspiring project manager or consultant. Success at these endeavors is largely based on a set of skills and methods that can be learned. I categorize the skills critical to a consultant as:

- Advisory,
- Technical,
- Business, and
- Communication.

We covered a basic outline of advisory skills in the previous chapter. We'll now review the other skills in turn.

## **TECHNICAL SKILLS**

Successful professionals, whether accountants, doctors, or musicians, are typically strong in the technical discipline of their craft. These skills are the focus of all the training, certifications, and diplomas. Frankly, this is the endeavor that we are drawn to by our character and desire. Most professionals select and concentrate on a particular craft because they cannot help it, because it's the field where joy, talent, and aspiration converge. In the IT field especially, it's been my experience that most conversations about how folks get into the business usually boil down to "Once I was exposed to it, I knew I belonged."

When working with consultants on the development of their technical skills, the most important advice I can give is that technical expertise is a process, not an event. The technology changes so quickly that those who master a current skill set and stop there are doomed to obsolescence. Technical training in IT must be looked at as a lifetime learning experience, and one hopes curiosity and the joy of scholarship will motivate the consultant to stay current. In the real world of commercial consulting, it's critical to remember that clients become more sophisticated all the time, and they expect their highly paid consultants to be at least one step ahead of them. Five years ago, knowing how to install a PC and a printer was enough to generate consulting engagements. I started my consulting career teaching customers how to set up their new IBM PC's. Now I frequently walk into client's offices and find technical teams that could rebuild the

Internet from scratch.

I've heard consultants say, "I don't need to know all about the subject, I just need to know more than the client." This is one school of thought, and even achieving this can be challenging. But the real value-adding consultant strives to do more, to gain depth as well as breadth in the technologies that drive competitive advantage for clients around the world. By subscribing to the IT trade magazines, scouring the bookstores, searching the Internet, attending vendor presentations and user-group meetings, and networking with your colleagues, you can ensure your ability to add insight to your client's decisions. In the professional world of doctors, lawyers, architects, and engineers, continuing education is a baseline requirement that is acknowledged and accepted as a cost of entry into the field. So must it be with IT consulting. The aspirant or ambitious veteran must come prepared to make the investment of continuous development in order to remain a viable player in the competitive world of commercial consulting.

As in all commercial enterprises, the market is the ultimate arbiter. If you find that your technical skill set is not bringing in the volume of business opportunities that you expect, perhaps you need to broaden your technical scope. Learning new skills and technologies can not only increase your value to the marketplace and to each client, but can also be a powerful antidote to boredom and to the "same-old, same-old" syndrome.

## **BUSINESS SKILLS**

One of the common themes in the current business press is the shortage of IT professionals in the labor market. Articles in PC Week (Mead, 1997) and ComputerWorld (Hoffman, 1998) and studies by the Commerce Department's Office of Technology Policy (1998) bemoan the fact that hundreds of thousands of IT jobs go begging every year for the lack of qualified technical candidates.

How much rarer still is the technical candidate who also has an understanding of business issues. The cliché of the computer nerd who must be kept in the back room with a screwdriver in his hand is, like most clichés, based on a nugget of truth. Many talented IT practitioners have never mastered basic business skills, and many managers did not consider these skills relevant to the IT function. Salary surveys published by the computer press often state that the average tenure of IT professionals is eighteen months (Cone, 1998). This mobile labor market hardly encourages in-depth understanding of the employer's business.

When I train a cadre of technicians who aspire to become consultants, I often begin by asking a series of questions about the companies they work for. I ask if they understand:

- Their company's mission,
- Its competitive strategy and position,
- Its sales and profitability,
- Its key clients,
- Whether it is publicly or privately held,
- Its stock price and performance,
- Its organizational makeup and key managers,
- How managers are compensated and motivated,
- Its history, and
- Its strategic priorities for the coming year.

The answer is usually a roomful of blank stares. This deficiency, sad to say, is universal in teams of apprentice consultants I've trained in my career.

This is also the most glaring insufficiency that clients note when they work with rookies: "How can this person deliver a solution that contributes to my business without any business experience?" The client's desire for gray hair as an indicator of experience can be a stumbling block for novices. It's often unfair in terms of the business value and technical expertise that a particular consultant can bring to the table. Most clients, however, are prepared to be advised by youngsters if they can be convinced that the young man or woman brings an understanding of business context to the project. Obviously, experience is the best teacher. For many technical professionals, however, the opportunities to be exposed to business functions other than IT are limited. Here are some techniques for overcoming this difficulty and for expanding your understanding of business issues.

- Read General Business Magazines. Subscribe to Business Week, Forbes, Fortune, or The Wall Street Journal. If you aspire to specialize in a particular industry or are an in-house consultant, read the trade journals that cover that business. If you work in a consulting team, copy articles and pass them around. I've worked in consulting teams that form a Journal Club, trading off the task of reading magazines within the group and meeting periodically over lunch to report on what they've read.
- Watch the Business News on TV. CNN's Moneyweek, PBS's Nightly Business Report and Wall Street Week, CNBC, and Bloomberg News offer a valuable background in current business conditions. They provide an education on the factors that drive markets, on the state of the economy, and on business sectors that are doing well (or not so well). It's a common occurrence that a feature on the business news will have relevance to a customer engagement in which I'm involved, either due to direct coverage of the company or a mention of its industry or sector.
- Use the Library and the Services of a Reference Librarian. A competent reference librarian can work with you to put together a reading program that will help you develop into a formidable consulting asset. Learning to use the reference material, such as the Business Periodicals Index, Gale's Encyclopedia of Associations, the U.S. Manufacturers Directory, the Thomas Register, and others can give you research skills that set you apart from the multitude of technically focused consultants with whom you will compete.
- Read the Fundamental Business Classics. Any business person who has not read Management by Peter Drucker (1993) is as lacking in a classical education as an English major who has not read Shakespeare. A program of reading in management, sales, finance, marketing, and business strategy is an obvious place to begin discovering the inner mechanisms of business.
- Use the Internet. The astounding volume of business information, from SEC filings to Dun & Bradstreet directories to company and vendor websites, brings a worldwide reference library to your desktop. The simple act of reviewing a prospective client's website or annual report before a sales call has been the differentiating factor countless times in my career.
- Include the Basic Business Questions Above in Every Consulting Engagement. This is the most important way to illustrate to the client that you approach the consulting relationship as a business-savvy strategic partner, and not just as a technical "hired gun."

These suggestions are focused on general business understanding. In the context of an impending engagement, however, knowledge about the specific company, industry, and project issues for the client company are critical to success. I recommend that consultants develop strong research habits as they prepare to engage with a specific client. My experience is that nothing develops client confidence and assurance more potently than a

bit of pre-project homework by the advisor. Consultants who walk in the door with some knowledge of the client's industry, company history, stock price, and competitive position create the image of an experienced and competent professional from the beginning of the relationship. I've constructed the Client Research Guidelines, Exhibit 2.1, to assist consultants in performing the basic business homework necessary to prepare for a client engagement.

## **COMMUNICATION SKILLS**

Consulting is communication. If this book drives home no other point, I hope it clearly emphasizes this. Without clear, open, and effective communication between the parties, consultation cannot take place. The ability to help customers articulate their needs, understand the capabilities and constraints of technology, and create a clear and compelling project vision are tasks central to the advisory process.

Yet, the popular picture of an IT professional depicts the opposite. The cliché is that the IT staffer needs to be kept in the back room, that IT people are either going to talk in technical jargon that will put the CEO to sleep or compare the client's business strategy to an episode of Star Trek.

Most IT professionals are intelligent individuals, folks who have mastered a difficult and demanding craft that has required diligent study and training. The idea that they cannot also be trained to communicate well is nonsense. People develop those skills for which they are mentored, compensated, and judged. Superior communication skills have not, until recently, been a requirement of the IT profession. In the mainframe days, IT teams worked in the infamous "glass room," talking mostly among themselves, usually with a manager from the finance department to act as their interpreter. As computing moved to the desktop, however, and the ability to provide support and service to users in a language they could understand became a valuable skill, communication came to the forefront. Those technicians who could avoid jargon, who could communicate clearly with the secretary, clerk, salesperson, and manager, became valuable commodities. In short, the desktop PC revolution forced IT to become more consultative.

The IT consultant, in a typical day of practice, will need to interview a client to understand his requirements, to examine a candidate and assess her suitability for a spot on a project team, and to report on project activities to a manager or project sponsor. In between these oral communication tasks, the consultant will probably be sitting at a desk preparing a status report, a scope of work document, a proposal, or some operational documentation. The skill central to all of these tasks is the ability to communicate.

Communication can be taught and learned. It can be taught by example: by showing the novice consultant how it is done in a client situation. It can be taught by practice: by having consultants in a team setting deliver presentations on their technical specialties, by forming Journal Clubs to report on what was read, or by organizing facilitated work sessions to let teams review customer engagements and develop solutions together. I often say that no single consultant "owns" a project; the team owns all projects. This viewpoint encourages every consultant to bring problems and experiences to the team and to work them through as a group. There is no better communication training than this.

For the single practitioner without access to a supportive team of colleagues, these options are less viable. Even the solo consultant, however, can join local user groups and technical associations and make a habit of sharing ideas. In the final chapter of this book some of the fundamental techniques that consultants and advisors have developed over

the years to improve their skills at interacting and communicating with their clients and teams are described in more detail.

The fundamental purpose of developing a consistent consulting methodology is to prepare IT professionals to excel in the central skill of consulting-communication. Business consulting has gone from an esoteric practice employed by a few experts to one of the fastest-growing job categories in our economy. During this period of explosive growth, practitioners have learned through experience some common-sense techniques that predispose consulting engagements toward success. Each of the steps of the IT Consulting Framework we will review in the chapters to follow is primarily an attempt to codify these communication practices into a system that consultants can follow to establish a clear, collaborative, and mutually beneficial relationship with their clients.

## References

- Cone, E. (1998, September 18). Rebirth of loyalty. Information Week.  
Hoffman, T. (1998, January 9). U.S. facing IT skill shortage. Computerworld.  
Moad, J. (1998, July 2). Study: Labor shortage to plague IT for years. PC Week.  
Office of Technology Policy, U.S. Department of Commerce. (1998, January).  
America's new deficit: The shortage of information technology workers.  
Washington, DC: Author.

### Exhibit 2.1

Client Research Guidelines

Company name:

Primary business:

Industry:

o Publicly held? If so, today's share price:

o Trending up? o Trending down?

Mission statement: (annual report or website)

Business objectives:

Key clients:

Competitive position:

IT strategies:

Key managers:

Revenue growth over last year:

Profit growth over last year:

Key business drivers:

Key performance metrics:

Other comments: