

# **Consultants**

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*In 1986, I submitted my first essay to the magazine of INTEREX, the HP3000 user community. Perhaps it will interest readers to decide whether my suggestions are still useful more than 25 years later. I updated the article in 2004 and 2007 and now to correct modified (or disappeared) Web references. For more old essays, see "Computer Envy: Essays on Office Automation." <<http://www.mekabay.com/opsmgmt/envy.pdf>>*

Office automation (OA) can be approached from two sides. For administrative services, OA is the introduction of tools developed originally in data processing (DP) to the office. From DP's angle, OA is the extension of "normal" methods to every wider fields of application. Because few of us have expertise in both spheres, a good deal of money is spent on external consultants who help bridge the gap between DP and OA.

Here are some guidelines to help both DP and OA staff extract every penny of value from their investment in consultants.

How much consulting gets done in industry as a whole? Globally, several tens of thousands of individuals and thousands of firms bill several billion dollars a year for services in general management, financial management, marketing, production, data processing, personnel, and small business administration. You can get information on sources of consulting by

- contacting your hardware and software vendor representatives and describing the sort of problem you are concerned about;
- speaking to members of your professional associations, including local and international computer users' groups for references to well thought of firms;
- contacting trade associations.

## **Scope**

When the client and consultant are discussing OA problems and how the consultant could help, both parties must be conscious that a consultant always has two allegiances: to the manager hiring her and to the firm employing the manager. You must define the scope of the consulting assignment so that the consultant can in fact legitimately tackle the task. For example, it would be pointless for a local OA manager to request assistance in deciding whether to implement satellite link teleconferencing nationwide within a corporation. Such a project would be beyond the manager's scope.

Sometimes consultants are asked by managers to produce support for a predefined set of conclusions as part of an internal political battle; consultants should be chary of accepting such assignments without making it clear that their report may very well disagree with preconceptions.

As you evaluate potential consultants, look for those who can state their understanding of your problems clearly. I am fond of the phrase, "Let me see if I have understood" because it's a

chance to test my perceptions against those of the client. When you have chosen your consultant, prepare an action plan that defines what you both plan to do, by when and how you will know when to stop.

All consulting is aimed at change: either fixing what doesn't work or improving what already does or inventing a new solution for a problem foreseen. By writing down what will constitute sufficient change, you ensure that your external consultant does not become an unwanted permanent member of your corporate family. A consultant is not a permanent employee of your department. A reasonable expectation is that with time, the frequency of consultant visits will decline for any specific project. As part of the assignment, consultants normally expect to work closely with members of the client organization to impart their knowledge and methods.

Consulting fundamentally involves teaching. I once met a consultant who did minicomputer performance analysis. I asked him what tools he taught his clients to use in analysing system performance; he answered, "Tools? I don't teach any tools. Listen, if a client is going to spend thousands of dollars on a performance monitor, I'd rather he spend it on me." Clients must ask their consultant exactly how their firm will become less dependent on external help by paying for consulting time.

A professional consultant will clearly identify the limits of her knowledge. Faced with requests for help in areas beyond his competence, the consultant will point out that alternative sources of information would be more cost effective. One test you can apply to judge the professionalism of a prospective consultant is to ask her to identify the limits of her professional competence.

## Ethics

The International Labour Organisation (ILO) had a useful code of ethics for consultants but it seems to have disappeared from the Web. [Anyone finding it is invited to post the current location in our comments section.]

The codes of professional conduct are basic instruments used by the consultants' associations to establish the profession and protect its integrity.... Thus members of the associations engage themselves

- To place the client's interest ahead of their own;
- To keep information about the client confidential and take no advantage of its knowledge;
- To accept no commissions in connection with the supply of services to the client;
- To hold no directorship or controlling interest in any business competitor of the client without disclosing it;
- Not to invite an employee of a client to consider or apply for suggested alternative employment;
- Not to calculate remuneration on any other basis than a fixed fee agreed in advance, which may be on a time rate;
- To inform clients of any relationship and interest that might influence the consultant's judgement;
- To accept no assignment which exceeds the scope of their competence;
- Not to work when their judgement might be impaired by illness, misfortune or any other cause;
- To refrain from seeking business by public advertising or by payment of commission for

the introduction to clients.

For good measure, you can also think about the Code of Ethics <  
<https://www.isc2.org/ethics/default.aspx>> of the (ISC)<sup>2</sup>, the certifying authority for Certified Information Systems Security Professionals, which comprises the following admonitions:

*Code of Ethics Preamble:*

- Safety of the commonwealth, duty to our principals, and to each other requires that we adhere, and be seen to adhere, to the highest ethical standards of behavior.
- Therefore, strict adherence to this Code is a condition of certification.

*Code of Ethics Canons:*

- Protect society, the commonwealth, and the infrastructure.
- Act honorably, honestly, justly, responsibly, and legally.
- Provide diligent and competent service to principals.
- Advance and protect the profession.

Everyone will benefit from consideration of these principles when choosing consultants and when delivering consulting services.

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