Effective Consulting Teams

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Are you collaborating with colleagues to provide consulting services to clients? Here are some guidelines for working together effectively to serve our clients.

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Consulting services can be structured in two distinct ways:

- We may be providing outsourced services for specific tasks viewed by our client as off the critical path for their primary mission; or
- We may be working to supply an immediate need but with a long-term view to increasing our client's autonomy.

Common Elements

Every consulting team needs to focus on value to the client. We bring our expertise to bear on specific problems to minimize the long-term costs of providing mission-critical information, improving specific operations, or eliminating specific difficulties. In all these projects, we consultants must *listen* to our clients with great attention and tease out critically important information that our respondents may not even be aware of until we focus their attention on what they may have accepted without question.

On starting our interactions with client personnel, it's crucial to have a clear mandate from upper management – not just the signing officer who ordered the consulting contract – for the work to be done. Taking on a consulting assignment without clarifying the customer's expectations precisely is an invitation for disaster – and a very short consulting career.

In approaching lower level staff, we should make clear that the goal of the consulting work is in no way to harm the interests of any stakeholders and especially not of the employees. Blame and finger-pointing are rarely useful elements of a consulting report – except if we are involved in a forensic investigation about specific abuse, if we are specifically hired to track down the causes of organizational dysfunction, or if our research on some other area of concern brings to light malfeasance or illegality. Usually, though, in my experience operational problems are not rooted in dishonesty but rather in conflicts of purpose, communications and interpersonal style.

One of the tools I have found helpful in my consulting work is what I call real-time notes: even back in the 1980s, I would immediately print out verbatim notes on conversations that I wrote on a laptop computer and give them to the respondent for review. I'd always ask them to let me know of any changes they'd like to make in the notes. Later, in the 1990s, it became much easier to link laptop computers to the customer's workstation screen, so they could actually see what I was writing in the notes in real time. This approach helped reduce anxiety about what I was noting and often resulted in more extended discussions of the issues as the respondent suggested additions (or occasionally deletions) of material.

When performing organizational analyses to detect and resolve interpersonal conflicts, identify under-performing staff or disruptive management behaviour, we often have to cope with a huge amount of information from many interviews. In 1986, when I had to collate and organize information from over 60 interviews in one organization, I invented Computer-Aided Thematic Analysis™< http://www.mekabay.com/methodology/CATA.pdf > (CATA™), an easy method that allowed me to make sense of about 88,000 facts, impressions, attitudes and behaviours that I had documented in my notes.

Another useful tool I created in the 1980s is Computer-Aided Consensus™< http://www.mekabay.com/methodology/cac.pdf > (CAC™), a simple extension of the Delphi Technique< http://www.seanet.com/~barkonwd/school/DELPHI.HTM > to encourage teams of people to generate and then organize as many ideas as they can as quickly as they can.

Both CATA™ and CAC™ are freely available to everyone and have additional documentation (as narrated available on the METHODOLOGY< http://www.mekabay.com/methodology/index.htm > page of my Website< http://www.mekabay.com >.

Within the consulting group, free expression of ideas and opinions is an essential principle. Consulting groups must function under the principles of *egoless work*< http://www.mekabay.com/nwss/435_egoless_work.pdf > as described in the classic work by Gerald Weinberg [Weinberg, G. M. (1971). *The Psychology of Computer Programming*. Van Nostrand Reinhold (ISBN 0-442-29264-3). Xv + 288. Index. Still in print: Silver Anniversary Edition (1998) available on AMAZON via link < http://tinyurl.com/9dk8f >. See pp. 52-60 in particular.] Suggestions for improvement in our methods for serving the client better are to be received with gratitude as contributions to continuous process improvement, not interpreted as personal criticisms.

The team members should be able to communicate immediately with each other, and all such communications must be sent and received using codes that indicate the project involved. For example, a project for, say, Hanofriengo Technologies (a name carefully checked to find that there are no hits for that string in Google!) could be indicated in all related e-mails using a subject line starting with "HT:" All team members must understand that only operationally significant messages are communicated with that prefix; ideally, there would be separate e-mail addresses for personal use by each team member. Thus team members in the Jinbu Corporation would have jinbu.com addresses for work but perhaps communicate jokes and personal news using their individual personal addresses. For more ideas on effective use of e-mail, see "Using E-mail Safely and Well (v4)".< http://www.mekabay.com/infosecmgmt/emailsec.pdf >

Consultants should always use digitally signed e-mail communications with their clients and with other team members; there should be no risk of man-in-the-middle attacks sending fraudulent information or instructions that could ruin the project. Communications involving sensitive data such as internal information from the client should be encrypted.

Specialists in the consulting team can play a valuable role only if their specialties are recognized by team members. For example, a marketing consultant's advice on marketing must be acted upon immediately; having a ur-techie dismiss the marketer's advice without a sound basis in successful experience is a waste of time and resources. Similarly, if there's a professional copy-editor in the team, it makes sense to pay attention to her advice.

A Web presence for the consultancy should highlight the organization's strengths in clear language – or in multiple languages – to satisfy potential clients' interests. The Website must be dynamic, with plenty of in-depth resources available at the click of a mouse. Two-layer Websites are too retrograde to generate respect in today's Web-savvy world: each topic should provide links to on-site resources at increasing levels of detail so that no visitor is left unsatisfied about the specifics of the services offered and expertise potentially brought to bear on their problems. The Website should also be visually stimulating; an example of creative Web design that always impresses me (although I'm biased) is the work of Dave Raimbach of InfoSec Skills< http://www.infosecskills.com/index.html >, the parent company that runs this blog Website.

The Outsourcer

If the consultancy is running a project to fill an unmet need in a client organization, the contract may be long term. Ensuring stability in staffing and providing methods for easy transfer of responsibility to other team members – or even to employees of the client – are important goals for all such work. Even if the client does not foresee internalizing the work currently performed by our team, management personnel and their priorities may change at any time. Having a well-designed transition plan is essential both for the interests of the client and for the reputation of the consultancy. Which verbal report would we prefer: "They left us in the lurch by sequestering knowledge" or "They documented everything for us and provided training for us so that the transition was absolutely smooth"?

Progress Towards Autonomy

As I wrote in the preceding paragraph, we must be ready in all cases to provide a smooth transition to client control of what we're being paid to do. However, there are many cases where the contract is explicitly designed to ensure that the assignment will not have to be repeated. These jobs have always been the most interesting to me in my career: they provide the opportunity to share knowledge and they usually lead to excellent relations with the client that lead to further – but new and challenging – opportunities for service.

When I founded my own consultancy in 1986, its name was "Jinbu Corporation;" speakers of Mandarin Chinese will recognize Jin\bu\ as meaning *progress*. My company motto, printed on the business cards, was "Progress Towards Autonomy." Many of my contracts included a clause requiring that a specific employee from the client organization be assigned to accompany me in my work for knowledge transfer – an apprentice, if you will. As I performed a security analysis, I'd explain what I was looking for and how I evaluated its implications in a back-and-forth discussion with my apprentice. Many clients called me back for further consulting work, but the projects were always different. It was fun!

I hope that these words of advice will be helpful to young entrepreneurs setting out on their own journey and also to people looking for reliable consultants.

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