



# A Strategy for Successful Consulting

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**C**onsulting is a widely used but often misunderstood term. Some say consultants provide clients with advice or perform professional services for them, but there's really no standard definition. We define it as a specialized professional service that provides expert advice to clients in a domain-specific field (such as IT or management). People hire consultants to diagnose, define, and solve their problems. But what does it take to be a successful consultant? Is just being an expert in the field sufficient to deliver an outcome the client will value?

Three main factors affect a consultant's ability to synthesize his or her accumulated knowledge, experiences, and expertise to efficiently deliver the desired advice and services. The successful consultant listens well, understands the client, and provides honest feedback and solutions.

## Listen to the Client

Listening is important in any profession but particularly in consulting. Furthermore, it's not just how you listen but also to whom. When diagnosing a problem and building consensus, successful consultants listen carefully not only to their clients—that is, the high-level manager who hired them—but also to mid-level technical, functional, and program managers. Such managers usually provide fresh information about

the organization's weaknesses, strengths, and threats.

## Understand the Client

Effectively understanding a client requires more than just listening. A consultant must continuously obtain information from the client and others (suppliers, competitors, and so on) and ask the right questions. Generally speaking, asking questions helps consultants focus on what their clients want, why they want it, and how their demands can be met efficiently and delivered effectively.

## Needs and Priorities

A consultant should start by asking questions to identify the client's needs and priorities. Each client has a unique organizational culture and business environment, both of which can change over time. Asking questions will help the consultant understand how the needs emerged and how best to address them.

Furthermore, clients don't always know what they really need. Collaboration between the client and consultants helps both sides better understand the problems and potential solutions.

## Interests, Ideals, and Incentives

By asking questions and gaining information about the client's interests, ideals, and incentives, consultants can acquire a good understanding of their client's

likes and dislikes—what excites and inspires them. This will help consultants identify how best to build consensus and gain client buy-in for their recommendations. It also helps build a strong relationship between the client and consultant, paving the way for a productive partnership.

## Culture and Values

Understanding an organization's culture includes knowing how the organization operates, how its employees perform jobs, and the appropriate and accepted ways of working and communicating in the organization. It requires identifying default values—the unquestioned assumptions and practices imposed on organizational routines. Questioning the culture and values can encourage the client to reevaluate default values—some of which might be behind the continued failures.

Understanding the culture also paves the road for establishing a strong, vibrant, and dynamic relationship with the client. This helps consultants acquire in-depth knowledge about the client's value system. Knowing what the organization values most and why can help consultants predict how the client will assess and implement their recommendations.

## Capabilities and Dilemmas

A consultant must understand the client's capabilities, resources, strengths, expertise, and competitive



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advantage. However, consultants similarly must understand the client's dilemmas—uncertainties, risks, or costs that are a nightmare for the client.

### Strategy

Having deep insight into the client's strategic vision helps the consultant understand how to present recommendations, advice, and outputs to meet client expectations. This is necessary, because critical decisions the organization makes today will impact its long-term strategy.

### History and Current Dynamics

Understanding the client's history helps a consultant identify critical elements that evolved to create the current situation. The consultant can then extract lessons learned

to outline how to avoid negative elements in the future to produce positive outcomes.

Furthermore, consultants should explore the current organizational dynamics shaping the game. They should know the trends and the uncertainty variables to anticipate the client's future.

### Tell the Truth

One advantage of being a consultant is being an outsider who usually isn't involved in organizational politics or power games. Consultants should try to stay out of such games—in fact, that's often why they were hired in the first place. They should tell the truth to their clients without any political considerations or short-term gains calculations.

Playing the old power game and taking sides can harm consultants'

job performance because they usually don't have detailed knowledge about the client organization's structures, processes, functioning, people, and formal and informal powers. Playing organizational politics can affect consultants' ability to obtain information and receive support, thus harming the value of their output.

**L**istening carefully to clients, understanding them, and telling the truth enable consultants to establish open communication and committed, collaborative relationships with their clients. Thus, they can build consensus around critical issues and the recommendations they provide. The consultant-client partnership might be temporary, but it provides a sense of belonging to

## FROM THE EDITORS

consultants and fuels their intellectual energy. Building partnerships also helps avoid the *principal-agency problem*, which arises when a party delegates a task to a paid agent who ends up hiding some information for personal gain. Breaking down bureaucratic barriers minimizes

the asymmetric information between a client and consultant. ■

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### Letter to the Editor

I very much enjoyed Tom Costello's article on repatriation and the potential impact to US companies of IT workers who may opt to return to their home countries ("Will Repatriation Cause IT Shortages in the US?" March/April 2010). While I firmly believe that there will be an impact from repatriation, I think the more pressing concern is that there will be a reduction of incoming IT talent from emerging countries. The number of freshman college students enrolling in IT and MIS curriculum in US universities and colleges has steeply declined over the past decade. US companies are forced to bring in IT talent from emerging economies to fill the void for entry-level as well as skilled IT professionals. Unless we can remarket IT as an appealing career option for students born in the US, I believe there will be a significant gap in US industries' ability to deliver and support IT in all but the most cache firms and industries.

#### **Beverly Prohaska**

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#### **Tom responds:**

Beverly raises several important points. First, the decrease in H-1B applicants is real. According to Homeland Security data, H-1B visas exceeded the

annual cap from 1997–2000 but then failed to meet it for the next three years. In 2004, the cap was lowered to 65,000 (where it remains today). From 2005–2009, the quota was filled within one week. For 2010 visas, however, it took over eight months to reach the cap (from April to December 2009). USCIS (US Citizenship and Immigration—a component of Homeland Security) reports that as of 1 June 2010, they've received only 22,000 applications since the April 1st start date. (Email me at [tcostello@upstreme.com](mailto:tcostello@upstreme.com) for full reference information.)

Likewise, her observation relating to decreased enrollment in MIS and computer science in US colleges is well documented and—combined with the decrease of H-1B applicants—appears to spell trouble for employers in the future.

The most troubling aspect of these problems (repatriation, decreased inflow, and poor perception by current students) is the time it will take to create a turnaround. If we won the public-relations battle today and convinced enough US high-school seniors to seek IT-related degrees, we'd still be five years away from their college graduation and perhaps another two years from them gaining sufficient experience to add value. Translation—in a perfect world, where we've accepted our problem and found a solution, we're still seven years away from impact.

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