

Consulting as a Process: Getting to know your client and using technology

By Stacy Wilson, ABC

Much like the strategic planning process used by talented communicators around the globe, consulting too is a process. It is circular because it feeds into itself, and it is strategic because it is grounded in the business and relationships. Here is one approach:



Each step incorporates multiple sub-steps. For example, "collaborate on the solution" may incorporate brainstorming, best practice benchmarking and collaborative implementation. Let's focus on some sub-steps in two of the process model steps: "Know the client and his/her business" and "Grow the relationship."

Know Your Client and His or Her Business

There are three things you need to know to serve your client effectively: the client (personally), the client's business and the team in which the client operates. A client interview will help you get started. Questions might include

1. How well do you think communication works in this organization?
2. What would you change about communication processes in this organization?
3. How would you prefer to work with me (e.g., how to communicate, roles)?
4. What are your expectations of me?
5. What is your communication philosophy?
6. What business strategies drive your key messages?
7. How would you characterize your role in the organization?
8. Who is your audience and what do you want them to do?
9. What barriers exist to achieving this behavior?
10. What will success look like, and how can we measure success?

As you work with your client, document things you learn about him or her, such as likes and dislikes, management, learning and communication styles, technology capability, family, hobbies and interests. Also, there are many things you can do to learn about your client's business:

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One thing is true for all consultants: If we have any work, we have clients. And one of the most important roles we have

- Talk to members of IABC who work for competitors of your clients' organization.
- Learn about market trends forcing change in the organization.
- Understand customer segments and what differentiates each.
- Read customer research reports.
- Know your organization's products and/or services inside and out.
- Identify subject matter experts across the organization.
- Learn about your organization's significant business cycles and what makes them tick.
- Find out what the business units are measuring and request to be copied on key reports.

is to maintain and enhance our relationship with the client.

Consulting Business

Everyone has an untapped reservoir of knowledge. Put yours to work as an independent consultant by teaching your skills to others.

Using Technology to Manage Client Information and Relationships

Technology has the potential to make your role as consultant much easier. In particular, technology can help you manage your client relationships more effectively. For example, use your e-mail application's contact database to keep track of the fact that your client has a daughter who just got into Harvard, use a project management application to track changes in the approval process for the HR enrollment project, and use collaborative web tools to improve the quality of conference calls about your new employee portal.

Perhaps some of these suggestions below will inspire you to take command of the technology available to manage your workflow and client relationships.

"As you work with your client, document things you learn about him or her[.]"

General

- Be aware of any incompatibility between the technology you use and that used by your client.
- Use page numbers to make it easier to refer to specific pages and text.
- Create templates with your preferred formatting in the applications you use most.

Using PDF Files

- Use the bookmark feature to allow your client to navigate the document more efficiently.
- Set the open preferences so the bookmarks show when the file is opened.
- Set file security to allow commenting, rather than locking down the file entirely.

Using E-mail and Contact-Management Tools

- Create tickler tasks in your task list to remind you of future client events or project deadlines.
- Keep notes in your contact files regarding client conversations and project decisions.
- Include your primary contact information in every e-mail, even replies.
- Use organizational tools built into your e-mail application to identify certain contacts, e-mail messages and meetings with particular projects.

"[T]echnology can help you manage your client relationships more effectively."

Word Processing

- Use change-tracking and commenting features to keep clients posted on your thinking. Teach your clients to also use these features.
- Use your word processor's readability tools to check and confirm readability of your text, or get a

third-party software that does the same.

Web Meeting and Collaboration Tools

- Use the whiteboard feature of your web-meeting application to collaborate during the telephone call.
- Use dedicated project space on your intranet or portal to archive project files and allow for collaborative discussion.

Each step in the consulting process is important to your success. Create a model that fits your needs and note where in the process you are with each client and each project. Simply paying attention will allow you to take advantage of opportunities previously undetected, and enjoy a greater sense of confidence in your consulting experience.

Stacy Wilson, ABC, is president of Eloquor Consulting, Inc. She has served as a consultant internally, in large consulting firms, and now is an independent consultant. Her "Consulting Skills for Communicators," a manual, toolkit and workshop on the topic, will be available on the IABC bookstore beginning in late March.