

IQC 03

Lessons Learned

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About Clients

Lessons Learned About Clients

Welcome to the Client Dance

- getting a project off the ground can be exhausting
- consultants start at a disadvantage and the client sometimes uses this as a negotiation ploy
- be firm and polite, but respect yourself, your abilities and your work

Lessons Learned About Clients

Beware the Scope Creep and Divergent Expectations

- the client starts asking for a little something which is not explicit in the agreement
- consultant agrees (for various reasons)
- then a little something else is asked, and a little something else, etc.
- at the end of the day, a whole new project has sprung up from these little bits, and the client has not had to pay for it
- you may leave room in the agreement for modifications, with the caveat that the workplan will need to be revisited (timelines and cost)

Lessons Learned About Clients

What Clients Want vs. What They Need

- not usually the same, sadly
- often comes about because a previous snake-oil salesman consultant sold the client on an approach or buzzword, or because competitors are doing something specific
- part of the consultant's responsibility is to offer advice based on expertise and to document that process
- ultimately, though, the decision rests in the hands of the client

Lessons Learned About Clients

Talk is Cheap

- some clients are full of promises when it comes to a project, but for whatever reason they do not respond to the proposal, or agree to a meeting, or make data available, or ...
- don't start work (in earnest) on a project until an official agreement has been reached

Lessons Learned About Clients

Disappearing Clients

- some clients pull out of the process (after initial contact, after proposal sent, after project has started, at invoicing, etc.)
- consultants should withhold deliverables until contact has been re-established
- document your attempts at reaching the client (email, phone calls, supervisors, etc.)
- learn how to sniff out disappearing clients
- mitigate the effect through regular communication
- if client disappears at invoicing time, you have some legal recourses, but prepare for a fight

Lessons Learned About Clients

Helicopter Clients

- some clients are micro-managers and want to be involved with every aspect of the project
- learn how to sniff them out early
- provide them with nominal work
- protect the consulting team
- put clauses in the proposal that clearly delineate the responsibilities and roles of each party

Lessons Learned About Clients

Desperate Clients

- some clients are turning to consultants as a last-ditch effort to save a project (and to shift the blame externally)
- often identifiable by unreasonable deadlines
- can become extremely stressful and taxing for the consultant team
- be clear about the scope, the objectives, and the deliverables, as often as required
- be prepared to return to the proposal often to point out what has been agreed to

Lessons Learned About Clients

Dishonest Clients

- there is no sugarcoating it: some clients will try to take advantage of the consultants
- do your homework – try to find out about the client before an agreement is reached
- trust your instinct
- protect your team, protect yourself: document conversations, collect a paper trail
- contact your lawyer as soon as problem arise (don't threaten to sue unless you are ready to do so)

Lessons Learned About Clients

Procurement Issues

- clients have an internal process to hire consultants
- for clients in the private sector, issues are minimal
- for clients in the public sector, there are rules in place to stamp out corruption
- various vehicles exist: sole-source, standing offers, expert advisor, etc.
- tendency is to try to squeeze in a large project under a small budget, because the alternative is contract splitting, which is not allowed
- don't sell yourself short – if the client can only offer 25K\$, don't offer 50K\$'s worth of service

Lessons Learned About Clients

Speaking Truth to Power

- there are instances when the client already has a pretty good idea of what the data is saying but they need a person who is external to the organization to relate it to stakeholders
- tendency to trust outsiders over internal experts, but it could also be because the client knows that the report will be poorly received and does not want to suffer the wrath of the higher-ups
- strictly speaking, there is nothing wrong with this, but consultants might not enjoy being set-up

Lessons Learned About Clients

Consulting Witches and Wizards

- quantitative methods are mysterious for a large swath of the population
- as a practitioner of the “magic arts”, consultants are often saddled with expectations that can sadly not be met
- quantitative methods (coupled with sound data) can achieve many remarkable feats, but consultants do themselves (and their colleagues) a disservice by not managing expectations of their abilities early (and often)

Lessons Learned About Clients

Calendars and Deadlines

- clients are not always forthcoming about their own internal deadlines and calendars, and may attempt to move the project deadlines in sync with changes in their own deadlines
- in regular progress reports, consultants should remind clients of the timelines for each task
- the clients may also have deliverables for the project (getting back to the consultants in a timely manner, providing the data by a certain date, etc.) – the proposal should reflect the effect of not meeting the deadline (task 3 will be completed 2 weeks after the data has been delivered by the client, say, rather than task 3 will be completed by October 10).

Lessons Learned About Clients

Data Availability and Quality

- invariably, the data is not as sound as the client thinks it is
- half the time, data will only be available way after it was supposed to be so
- the proposal should reflect the need for data cleaning and exploration (in the methodology)

Lessons Learned About Clients

Dealing with Adversity

- even when all the stars are aligned, and the consultants did a top-notch job, and the clients provided domain expertise and quality data on time, it remains possible for the results of the analysis to not be to the client's liking
- they might ask for a re-do (or a refund), and put your credentials in doubt
- the proposal should reflect the nature of quantitative projects, i.e. the data/methods do not always support the client's hoped for results
- **DO NOT ENTER INTO A CONTRACT WITH A CLIENT WHO DOES NOT AGREE TO THIS FUNDAMENTAL FACT**

About Consultants

Lessons Learned About Consultants

Importance of the Post-Mortem

- you cannot learn your lessons if you don't know what your lessons are!
- cannot be overstated

Lessons Learned About Consultants

Boom or Bust

- it is often the case that consultants (especially individuals and small teams) go through periods of months without a consulting project, followed by short periods where everyone and their neighbours want you to work with them, which wreaks havoc on work-life balance
- project management is key in boom periods
- bust periods can be used for research and learning

Lessons Learned About Consultants

Protecting Yourself Against Unreasonable Clients

- it is going to happen
- get a lawyer and a support system before it does
- exercise, develop hobbies, volunteer – be something other than a consultant at times

Lessons Learned About Consultants

Teammates as Hurdles

- sometimes it will feel that your teammates are hindrances in your pursuit of consulting success
- they just don't understand, or focus on something you consider to be superfluous
- be that as it may, treat your team members (and the client) with respect at all times – there will be times when you'll be really glad to have them on board

Lessons Learned About Consultants

Academia vs. Business World

- as a quantitative consultant, you have technical skills which are in high demand
- you are an EXPERT and want to provide the best possible solution
- theoretical solutions are not always actionable
- best means best for the client, not for your publishing record (most of your consulting work is unlikely to be publishable, while we're on the topic)

Lessons Learned About Consultants

Selling Yourself Short

- don't do that!
- you have skills, your time and work is worth something on the open market
- don't work for free (unless it's part of your *pro bono* contributions)
- ask for the going rate
- slim line between confidence and cockiness

Lessons Learned About Consultants

Keep Your Edge

- try to continue learning new methods and approaches on a regular basis
- maintain your qualifications/certifications
- some projects will fail – try not to make the job harder for the next consultant