THE SKILL OF ADVISING

WHEN SHOULD YOU CHALLENGE YOUR CLIENT?

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When presenting recommendations to a client agreement on the way forward is sometimes reached easily and sometimes not. Consider a situation where a client dismisses a solution approach which, based upon your experience, you believe to be crucial. Should you, as a consultant, accept this view and abandon the idea? Provided that you have built sufficient credibility it is usually acceptable to challenge your client's opinion and this is a key part of your role as an advisor. Provided that a constructive and diplomatic approach is taken, clients will usually respect you for this.

Consider the following example:

A consulting firm in North America working towards the automotive industry advised a long-standing client to replace an aging, yet business-critical support system. The consultants suggested that this action was wise considering the company's ongoing technology strategy, but would more importantly eliminate the risk of

potential capacity shortages in the short to medium term. The client reviewed this advice but elected to decline the recommendation, stating that the existing system would meet their needs for the foreseeable future. The consultants acknowledged this respectfully.

A year later the client ran into serious capacity problems and was forced to make large financial outlays to remedy the situation. It was only then that they realized that in the first discussion the consultants' recommendation had been correct and their response short sighted. 'Why did you not push us?' remarked the client, in a later discussion. 'Why did you not come back to us last year and insist upon the importance of taking action...?'

As a consultant you are an advisor. An advisor who simply agrees with the client's position every time has little value. If you think that your client is about to make a mistake then challenge them,

constructively, and use good arguments when doing so. Keep in mind, however that this situation can also work in reverse, illustrated by the example below.

A consulting team was engaged to design a business solution for a client in Scandinavia. The solution approach was formulated in three parts, each designed to address a specific issue recognized within the target organization. Having already conducted a number of successful projects together with the client a good relationship was already in place.

When the first part of the solution approach was presented it received positive feedback and the client representatives provided inputs for use in its further refinement. The second part received similar feedback and plans were discussed for its implementation.

But when the third part of the approach was presented, the clients listened in earnest, considered the recommendations but elected not to adopt them. 'We will move forward based upon the first two solution areas' they concluded.

After the meeting the consultants discussed the feedback that had been provided. They were somewhat disappointed regarding the response to the third part of their approach having seen it produce excellent results in another organization. They decided to re-engage and raise the matter with the client again. In a subsequent meeting they put their best efforts into presenting the approach and emphasizing its benefits. The clients listened willingly but

at the end of the meeting their position was unchanged. The feedback, in short, was 'that type of approach will not work well here.' The matter was concluded and the assignment moved forward based upon the areas that had been agreed.

During the subsequent months the consultants worked closely with the client interacting regularly with the parts of their organization affected by the project. As their familiarity with the client's organization increased they realized that the client had been right. The rejected solution approach would probably never have been embraced by the people working there. It was simply not a good fit for their culture and ways of working.

In consulting we are passionate about formulating recommendations and designing solutions to meet our clients' business needs, based upon our expertise and experience. At the same time every client situation is unique and nobody understands the client's business better than the clients themselves. This makes the process of validating any solution approach particularly important and leveraging both consultant and client knowledge in the process.

AUTHOR BIOGRAPHY

Samir Parikh is a principal business consultant, practice manager, and consultancy CEO with over 25 years of industry experience. In 2000, Samir founded *SPConsulting* a global management consulting firm specializing in organizational strategy and change management.

With a track record of projects conducted in more than 50 countries the firm works closely with companies that are transforming into consulting-based organizations, delivering solutions and professional services in highly competitive environments.

FURTHER READING

Samir is the author of *The Consultant's Handbook*, published by John Wiley & Sons. This book provides a comprehensive guide for the practical implementation of consulting skills by professionals working in consulting and professional-services-related disciplines.

The book contains additional guidelines, examples and use-cases to support readers in implementation of consulting techniques, as well as practical tips and lessons-learned from real consulting engagements.