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Consulting Rules of Engagement

An internal Memo

By Ammar Mango

A big part of a manager's role is to communicate vision, mission, and core values. In a consulting environment, this might be even the more important. Here are excerpts from a long memo I found in my files called "Consulting Rules of Engagement". I thought I would share it with colleagues through PMForum and *PM World Today*.

"Providing sustainable benefits to the customer and our company in an ethical and professional fashion should be the mission of every consultant. All our consulting engagements should be based on win-win arrangements where BOTH our company and client must win. If a consultant feels that a certain engagement is a win-lose one, then the consultant must clearly and promptly communicate such concerns to her or his direct supervisor to understand management point of view. At the end, all engagements must be win-win. You as a consultant must understand our company's line on how we provide value, buy into it, and commit to it. Otherwise no long term value adding relationship can be sustained with client or with our company without this win-win mentality.

All of us face external temptations and pressures in everything we do. However, these pressures and temptations should never be an excuse for us preventing us from doing the right thing. We as professional consultants should ask ourselves what is the right thing, in an unwavering objective fashion and stick to doing what is right. Sometimes doing what is right requires politics, shrewdness, and being smart. Use all the tools the consultant have available to do what is right, in a professional and ethical manner.

Remember that being smart, shrewd, aware of politics, and human psychology, is not reserved for people who are unethical. Unfortunately, due to what people see in today's business world, they seem to associate smart, shrewd, and persuasive behavior with unethical and dishonest people. Honest, professional consultants are more entitled to use these tools and be smart than the dishonest ones. We are using them for doing what is right. Never assume that doing what is right means "telling it as it is". No one can claim ownership of the truth or claim that her or his personal opinion and interpretation of the truth is the absolute truth. Remember that how one says something is more important than what one says. It is naïve and borderline stupid not to take into consideration political and psychological factors in determining your best strategy and tactics. A consultant can be smart and shrewd and yet professional at the same time. A consultant has to be.

The client is the reason we are in business and the only source of our income. Do not assume that without the client we can be operational. We cannot. This is why utmost respect of the customer should be present in your mind at all times. Sometimes, clients might not do what we think is right. They do not have to. Remember they are the client and they see things from their perspective, not ours. The best way to work with clients is to first remember that they are the reason we are in business. We are in business to provide them value. Of course we want to make money, but money comes from providing value in all honest and professional dealings. Second, a consultant must see where the client is coming

from. The client faces pressures, and is affected by personal background and experiences, and a consultant must respect the client's background. Respect does not mean judging it as good or bad. It means understanding it and accepting it.

The best way to persuade the client is first to listen to him or her. Again, not in a judging fashion, but listening seeking understanding. Then, one needs to show the client how to get more value. How to do things better, faster, less expensive. This is what the client wants. Excuse the client if he or she does not jump up and down about a new business fad, or a best practice the consultant are suggesting. The client wants results, and unless the consultant can show the client that certain recommendations will eventually yield results, then the client will not and should not cooperate.

If we do not respect the client or do not understand him, we cannot work with him. Disrespect or lack of understanding will show easily on your face and body language and behavior and make the consultant and the client very uncomfortable working together. Once there is understanding, trust, and respect, work can progress.

The mutual respect between the client and the consultant should be held in ultimate regards. Respect comes from being yourself first. Faking professionalism and ethics shows eventually and is very counterproductive. One can show professionalism and ethics by what one does more than what one says.

Some young consultants sometimes walk into our office frustrated from certain behavior from the client during their site visits. Their frustration comes from their lack of respect for the client. Remember, no frustration comes from a person if there was no level of disrespect somewhere. If a consultant disrespects the client, the consultant cannot help that client improve. Imagine at home a parent frustrated with a child's behavior. That frustration carries with it a certain level of lack of respect. If a parent understands and relates to the child and does not judge, then the parent has a better chance to help the child identify unwanted behavior and reduce it in the future. This applies to adults as it applies to children.

Lose your frustration in your pursuit of a bigger and more noble mission of eagerly wanting to serve and help your customer. Your frustration is an ego thing preventing the consultant from seeing anything but yourself and the inconvenience the situation has caused the consultant."

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