



The Quantifiable Components of Quality Consulting

by Karen Malody, FCSI

I have discussed with dozens of consultants in various fields over the past 20 years the question: "How do I deliver quality to my clients?" At the 2002 FCSI Conference in Barcelona, I led a chat room discussion on this very question. We began to realize that another critical question required answering first: "What is a consultant?"

"Webster's Unabridged Dictionary" defines a consultant as "a person who gives expert or professional advice." I then looked at consult: "to seek advice or information from; ask guidance from; refer to for information" and "to give professional or expert advice; to consider or deliberate; take counsel; confer with." In other words, without someone seeking an answer to a problem, there would be no need for consultants. I find this humbling and revealing. Elaine Biech, in her book "The Business of Consulting: The Basics and Beyond," clearly indicates that we, quite simply, "start our businesses to serve clients." She further admonishes that we must "Serve them well!" The key to serving them well is assessing the personal and environmental vectors that compound in them, causing their call to us in the first place. The direction and magnitude of these vectors is almost always a mystery to the client. So quality consulting revolves around our ability to listen to what they ask and to be able to determine quickly what it represents. Because that is really what must be dealt with.

Let's take a look at a potential client at the moment they pick up the phone to make their first call. They are struggling to articulate their need, immediately casting the consultant in the role of interpreter, diagnostician and astute listener. And let's also remember that their state of need carries with it a certain degree of vulnerability, a reality we need to be sensitive to at all times.

As Biech indicates, "your initial contact with a new client is more important than you can imagine. Your comfort with one another and your ability to communicate clearly and candidly are critical." From this first discussion, we must interpret what we've heard in such a way that we are able to feed it back in a manner that reflects understanding. From there, we must quickly assess if their need matches our competency and, if so, how to convince the client to trust us enough to at least flesh out a proposal. To be *effective* – a requisite of manifesting *quality* – we must learn, after quick analysis, if the client's situation is one to which we say "Yes, I can help" or "Not me, but I know who."

What the client rarely realizes in entering a consulting relationship is lurking behind the request for help are a number of vectors. I use the math term *vectors* instead of the more common *issues*, because vector carries with it the concepts of magnitude, direction, and rate. The initial client request is actually the sum total of a number of vectors - forces, concerns, issues - that each have magnitude (ethical, financial, political), a direction (relative to each other), and a rate (increasing, decreasing). They are both personal (relating to values, insecurity, willingness to risk) and environmental (social and political forces). Notice that neither of these stem directly from the business itself, which fostered the original request for help. And herein lies a potential threat to quality results. To avoid this threat we must ask three questions:

1. Have they defined the right problem (proper diagnosis)?

2. Can we visualize the true correct solution (treatment)?
3. Can we transition the client from (1) to (2) without trauma? If any answer is NO, the odds are overwhelming the client will not feel we have done a quality job.

We must ensure and assure that from the first discussion and on through the proposal, that we have not only defined the situation correctly but expressed it in a way that engenders mutual understanding and agreement on what the course of action will be, how long it will take, what the steps will be, what it will cost and the results/deliverables the client can expect. Definition of project scope is critical, for only in doing so is consensus achievable and "scope creep" avoided.





So, how do all these vectors affect us? What is the client subliminally requesting? Over 20 years of consulting has led me to identify frequent, and extremely important, roles a consultant typically plays—and needs to play. If the client is not always aware of the following, let us be so that we can be conscious, conciliatory and clear in our actions. If consultants embrace the roles described below as key elements in the creation of a differentiating approach to consulting, the opportunities for improving our clients' perception of us as exemplifying "quality" increase exponentially.

Role 1: Harbinger of Hope, Oracle of Optimism

If we were to tell a client, at least up front, that they were seeking self-efficacy - the belief that they have mastery over

the events and situations in their life and can meet challenges as they come up – they would undoubtedly look askance. Most clients have not consciously called us to receive therapy; but often psychological intervention is exactly what is needed. Developing competency of any kind strengthens the sense of self-efficacy, making a person more willing to take risks and seek out more demanding challenges. In fact, that is what consultants must do, for creating a dependence on us is not the fair thing to do. We must help them learn to problem-solve, make better decisions and move forward in their business with newly gained autonomy, competence and confidence. In the best cases, haven't we helped them gain new skills? Ah, we chat room participants thought – might that be one identifiable element to quality consulting?

After all, people's beliefs about their abilities have a profound effect on those very abilities. Ability is not a fixed property; there is a huge variability in how we all perform at any given time. People who have a sense of self-efficacy bounce back from failures; they approach things in terms of how to handle them rather than worrying about what can go wrong. Hope is a definitive indicator in how people perform. They can't, or don't say it, but most clients come to us with hope – the hope that we can help them solve a challenge, be it management, design, morale or financial issues. Given roughly the same range of intellectual abilities, emotional aptitudes make the critical difference. They play a potent role in life, offering an advantage in diverse realms. "Believing you have both the will and the way to accomplish your goals, whatever they may be," claims C.R. Snyder, a University of Kansas psychologist who performed groundbreaking research

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on emotional intelligence.

Much of what makes us emotionally intelligent – able to see more clearly and make more positive decisions – is optimism. Optimism is the great motivator, as Snyder further states, in that it represents “an attitude that buffers people against falling into apathy, hopelessness or depression in the face of tough going.” They see setbacks as something that can be remedied. Martin Seligman, another pioneer in the psychology of alternative intelligences at the University of Pennsylvania, defines optimism in terms of how people explain to themselves their successes and failures. Let’s help our clients do that.

Role 2: Flow Agents

My psychiatric social work background profoundly impacts my approach to and attitudes about consulting, but time and again it has been dramatically revealed that clients who come to me are “stuck” in some way. They have lost their groove, their clarity, their focus, their joy – they are not in their zone. Helping people harness their emotions in the service of performing and learning becomes crucial to success. “In flow, the emotions are not just contained and channeled, but positive, energized and aligned with the task at hand,” asserts Mihaly Csikszentmihalyi, University of Chicago psychologist and researcher as quoted in Daniel Goleman’s book, “Emotional Intelligence.” Flow, he clarifies, “is a state of self-forgetfulness – the opposite of rumination and worry ... where emotions are harnessed in the service of performance and learning”.

The book goes on to explain various ways that we might assist our clients in entering for the first time, or re-entering if it has been lost, a flow with their business. With certainty it can be deduced that without flow, there is no go. We can help them:

- Intentionally focus on the task at hand – a reclamation of clarity
- Get involved with a process and with a task at which they are skilled, and engage in it at a level that slightly taxes their ability. Sometimes people actually need a greater demand being put on them – it prevents boredom. “Flow occurs in that delicate zone between boredom and anxiety.”
- Reach a state devoid of emotional static, except, hopefully, for a mild feeling of ecstasy from having reconnected with their internal values and goals.

Role 3: Temporary Chief Visionary Officer

Many consultants don’t realize that we sign up to become cognitive reframers? Unwittingly, perhaps, we absolutely do. It is critical that, in most cases, our clients be assisted in viewing their challenge/problem/situation in a new light, particularly a more positive one gilded with hope and resolution. It has been proven that people in good moods, who think positive thoughts, have a perpetual bias that leads them to be more expansive and positive in their thinking. As in the book and movie, “Stella Gets Her Groove Back,” so do our clients as a result of our influence. We become catalysts for insights that carry them into new states of mind to effectively move forward with their tasks. If done well, the resulting state of mind carries with it vision and enthusiasm for the future never before comprehended. Now *that* is a quality result.

Role 4: Diagnostician

As has been already mentioned, one of the most challenging aspects of consulting can sometimes be the necessity of communicating our view of the client’s situation or issue when it differs from theirs. In many cases, they naively think that if they present the problem – “if we had better equipment our food would be better” – we can simply outline a workable solution – “replace the microwaves with salamanders.” Problem fixed, thank you very much. But what if ingredients are substandard? Recipes are not documented? Staff is beleaguered and negative? New equipment won’t fix those symptoms. Perhaps nothing is more discouraging than trying to place a Band-Aid on an infected wound knowing that penicillin is needed. We must diagnose with professionalism and push for the higher ground, all the while navigating the situation so that the insight seems to have come from the client. With this accomplished, they take pride and commitment in ownership of the solutions, which manifests in a momentum not attainable by simply telling them what to do.

Role 5: Temporary Chief Executive Officer

On numerous occasions during a consulting relationship, it has become clear to me that I am actually leading the company. It is most frequently unspoken – and might horrify some leaders to see this clearly – but, in fact, chagrined leaders can be known to abdicate their roles for a period of time to relieve stress and reclaim clarity of

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vision and purpose. In some cases, I have had clients own up to this and willingly request my aid in helping get the company refocused. This is a far cry from coming in to develop new menu items. But as revealed before, rarely are the new menu items a total solution. Success in business is a calculus equation not a problem in addition or subtraction. We must be cognizant of the subliminal, yet powerful, leadership roles we play in establishing a course for someone's business. We mightily influence their decisions. It can make us heroes or, as easily, bite us in the hindquarters if the culpability of a poorly executed decision gets transferred to us. Suddenly, we lose our quality consultant status. But didn't we think we did a good job? Expressing continuous insight and observation helps keep the likelihood of this blame-transference mode minimized. To protect ourselves, we must fix the problem as we know it to be, not as they think it – and that means at some point in the process we will have to deftly assume command.

Role 6: Executive Coach

I've rarely encountered a client who was not seeking, however sublimated the awareness, a caring ear, an intelligent cohort, an astute business partner and/or a coach and mentor. The lines between professional foodservice expert and business coach can be extraordinarily fine. My observation is that it is nearly impossible to get through the entirety of a consulting project without slipping into this role at one time or another. Again, I communicate this dynamic to the client when I see it covertly or overtly occurring. Because of my background, I am able to comfortably assert that role, but it is not necessarily what they thought they were paying me for, and the psychological and financial implication it creates must be brought to

the top of the table, stated and negotiated.

Without fail, the existing state of a business and the dynamics within are, or will be, driven by the person at the helm. How, then, can we not commit ourselves to supporting that person in being the most clear, the most aware, the most appropriately powerful they can be? Gay Hendricks, Ph.D. and Kate Ludeman, Ph.D. in their book "The Corporate Mystic," explain it this way after interviewing over 1,000 successful leaders: "...[an effective leader must] distill their learnings into "just-in-time" wisdom ... where they teach others how to do soul-satisfying work in a way that empowers, heals and profits. They operate from a base of integrity, pursue their visions with passion and compassion and evoke the full potential of those with whom they come in contact." Not only do quality consultants manifest those qualities, but to assist someone else in gaining them is infinitely satisfying.

Role 7: Quality Assurance Champion

If quality issues have become key troublesome components of the situation, it is often required of a consultant to take up the banner of belief. We must reassert the need for, and ability to create, quality products, designs, service and internal relationships within the company. Sometimes it may seem as though we are the *only* participants who believe it, as the internal quality habit has been so abandoned or poorly executed for so long, that clients have forgotten what is possible. Quality efforts are in remission. Even more, what is required to sustain and/or regain a successful position in their competitive market has been temporarily misplaced. We become the definers of quality – the standard-bearers, the interpreters of excellence, the bastions of reclamation. Our positive attitudes become a key component of the reclamation. The groove of the company returns in full force, probably more so than at the time it began to fade into mediocrity.

Conclusion

This definition of quality in consulting is designed to keep us all aware of the multiplicity of factors, spoken and unspoken, that influence our client's perception of our "quality."

The degree to which we listen carefully, interpret accurately, communicate clearly, keep our word, honor the humanity of our clients, and remain humble in the face of complexity is the degree to which we achieve the hallmarks of quality consulting.

In the end, without the respect, commitment and loyalty of our clients, we have no sustaining role to fulfill. Henry Ward Beecher says it all: "Hold yourself responsible for a higher standard than anybody expects of you. Never excuse yourself." Whether we have consciously acknowledged the realities explained above, bringing attention to their existence in a consulting relationship can only bring us closer to excellence. Projects end, but relationships do not. Put another way, if we add value, if we are effective, the work will be there.

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