



**British Computer Society**  
**The Chartered Institute for IT**

**Consultancy Specialist Group**

**Webinar**

**Managing Expectations -  
Achieving harmony between  
client and consultant**

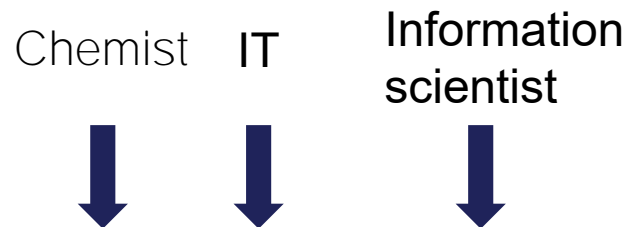
**Martin White FRSC FBCS HonFCLIP**

**18<sup>th</sup> March 2021**



# Managing Client/Consultant Expectations

## Some lessons learned the hard way



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# Organist and consultant



# Jed at altitude



A famous high-rise



# Inside the IMF



# My ground rules

- When I set up Intranet Focus Ltd. I had seven rules of engagement
  1. I will only work in areas in which I have business experience
  2. I will not work for central or local government
  3. I will not work to a scope decided by a procurement department
  4. I will only work on a fixed fee basis
  5. I will only work on interesting projects
  6. I will always ask for a meeting with the project sponsor before starting work
  7. I will always smile.



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  7. I will always smile. It makes other people wonder what you know that they don't





# Learning from Logica



The primary task of a consultant is always to be able to **differentiate between 'fitness to specification' and 'fitness for purpose'**

**Delivering an outcome that is fit for purpose is more important than delivering profit. If it is fit for purpose then the profit will come**

# Information science meets IT



We need to replace our intranet/enterprise search/e-commerce search/information management/knowledge management application

We need to have a set of requirements that we can share with solution vendors

We need a list of vendors

Can you recommend a vendor?

# The neophyte client



Nick White



SIX

EDGAR H. SCHEIN

NINE

# HUMBLE CONSULTING

HOW TO PROVIDE  
REAL HELP  
FASTER



ght,

ng.

ife

*We live in a pragmatic, problem solving culture in which knowing things and telling others what we know is valued . . . Having to ask is a sign of weakness or ignorance, so we avoid it as much as possible.*

Edgar Schein

# The big concerns... and my Roadmap

**#1 How can we build a win-win relationship?**

**#2 How will I manage scope creep?**

**#3 How can we ensure we get value for money?**

**#4 How will risks be identified and managed?**

**#5 How will we define user requirements?**

**#6 How will we keep track of the project?**

# The big concerns... and my Roadmap

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**#1 How can we build a win-win relationship?**



# Plan the first meeting agenda

- Always in advance of a contract
- Have something ready to share
- Find a common area of interest within a couple of minutes
- How much experience do they have of managing a consulting project?
- Create a joint agenda as this establishes implicit guidelines on 'give and take'
- Share and develop objectives (consultants have them as well)
- Agree how progress and communications will be managed



# Seven step model for project management

1. Define
  2. Plan
  3. Initiate
  4. Monitor
  5. Adjust
  6. Deliver
  7. Learn
- The open question at the start of an engagement is who is going to manage the project?
  - Clients have a habit of assuming that the consultant is going to run the project, especially if they are very pushed for time or have little PM experience, or both!



## #2 How will I manage scope creep?



# Working backwards from the report



- Almost always the end result of a consulting assignment is a report
- Yet rarely in my experience is there ever a discussion about the format, content, length etc of the report at the outset of a project
- In particular,
  - Who is going to read it
  - What is already common ground
  - What decisions are they going to take having read the report

# Report scope agreement

Intranet Strategy Structure 02 October 2014 Draft for Discussion		
Main heading	Sub Sections	Page
Executive Summary		0.5
Overview		0.5
2015 corporate strategy	Business	0.5
	Employee	0.5
Current situation	Intranet landscape	0.5
	Technical	0.5
	Resources	0.5
	Migration overview	0.5
Governance	Structure	0.5
	Policies	0.5
User requirements		1.0
Roadmap 2015	Services/portal approach	0.5
	Migration plans	1.0
	Development	0.5
2015 Development	Platform	0.5
	Search	0.5
	Collaboration	0.5
	Mobile	0.5
	Social	0.5
Team	Skills and resources	0.5
	Governance	0.5
Metrics	Summary	0.5
	KPIs	0.5
Risk register		2.0
2016-2017	Overview	1.0
	<b>Total</b>	<b>15.5</b>

The aim of presenting the report structure at the earliest point possible is that it helps define the overall and sub-level objectives

Clients appreciate the transparency and have something tangible to show their manager

The page allocations may change during the project. If the total is unchanged then so is the fee

If a significant change in scope becomes a requirement then there is a basis for a discussion about a fee change

# The big concerns... and our Roadmap

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# #3 Getting value for our money

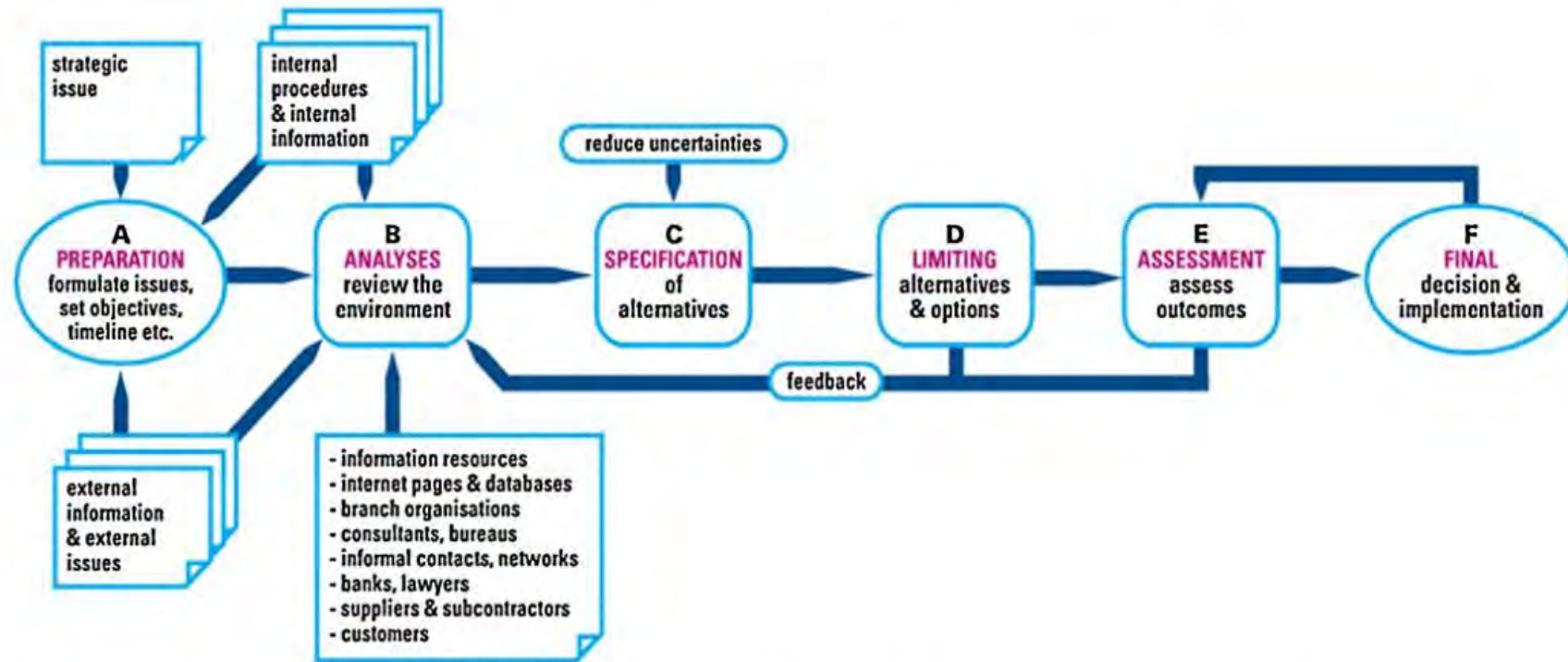


# Decision-focused value

- What decision is going to be made as a result of the engagement?

496

*C.L. Citroen / International Journal of Information Management 31 (2011) 493–501*



**Fig. 1.** Model of the phases of a rational decision-making process. Rounded boxes indicate the five phases in the decision process; square boxes contain parameters that provide input for the indicated actions. Arrows indicate the main direction of interactions.



# Risk reduction value

- A Board of Directors has a duty to manage the operational risks to the business
- Operational risks are visibly presented in annual report, and have to be signed off by the Board
- Risk management is a good way to start a discussion about an engagement and also to justify the engagement fee and corporate commitment against the potential benefit to the business



**#4 How will risks be identified and managed?**



# Project risk management



- There are of course many approaches to scoring and managing risk, but LoB managers may not be aware of them.
- Bringing a discussion about project risk management into the project plan at the earliest possible point reassures the client that there is a common agreement that risks need to be placed very transparently on the table
- Zero risk is not possible – it's a question of the risk appetite on both sides

# From my experience

1. No access to the project sponsor on a timely basis
2. Difficulty in remote access to internal systems and file shares
3. No access to documents that have a bearing on the project
4. Key staff are not available for interview
5. The client's project manager is overloaded
6. The scope and/or deliverables are changed by edict, not agreement
7. Payment is not made on the agreed contractual terms



# The big concerns... and our Roadmap

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**#5 How will we  
define user  
requirements?**



Without all the evidence the project will fail

# Applied ethnography

# INSIDE THE IMF

An Ethnography of Documents, Technology and Organisational Action

Richard H. R. Harper



# Defining user/employee requirements



- Clients are often very uneasy about letting a consultant loose in their organisation
- Will the interviewees be annoyed, reluctant to speak etc.?
- User interviews rarely get the level of attention that is required in the project planning
- Working in Germany in particular is a special challenge!
- Will they talk about the work-arounds?

# Uncovering workarounds

When the project is  
derailed by two (or  
more) versions of the  
truth

The University of San Francisco  
**USF Scholarship: a digital repository @ Gleeson Library |  
Geschke Center**

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Business Analytics and Information Systems

School of Management

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3-2014

## Theory of Workarounds

Steven Alter

*University of San Francisco, alter@usfca.edu*

# Defining interviewee personas



**Frank**  
*Financial  
Performance Advisor*

**Goals:**

- Staying informed drives business performance
- Validating with my people network is critical to understand business issues
- Trust in information (all information) is paramount to making accurate decisions

**“Accurate, timely and validated information drives strong business performance”**



**IVAN**  
*Information Technology*

**Goals:**

- Delivering high-quality service to business
- Consultation and management of projects
- Identifying new and efficient ways to improve solutions and processes

**“We effectively manage our technical and people resources, while constantly delivering value through innovative products and services that helps the business meet it's objectives.”**



**Leslie**  
*Legal & Compliance*

**Goals:**

- Responding quickly to ad-hoc requests from business partners.
- Recommending courses of action that minimize risk and liability.
- Maintaining a strong network of internal and external people and information resources.

**“I need to constantly stay informed of changing market and industry conditions that affect our business in order to give the best advise.”**



**Mitch**  
*Medical Affairs & DRA*

**Goals:**

- Ensuring that all materials and reporting of any adverse events are accomplished in an accurate and timely manner.
- Watching deliverables and timelines to ensure that projects don't slip.
- Maintaining a strong network of company contacts internally and externally.

**“We need to closely monitor our trials, our post-marketing data, and all submissions to regulatory authorities.”**



**Sam**  
*Sales & Marketing*

**Goals:**

- As we learn to communicate with one voice, we avoid costly compliance fines & drive our brands.
- We are rigorous in crafting and targeting high value info to our sales force. We need to eliminate and cleanup our outdated information.
- We need to constantly develop our employees – metrics on headcount and top performers is critical.

**“We can grow our business, respond to changing marketplace conditions, and develop our employees by having fast and accurate access to the information we need, when we need it.”**



**Randy**  
*Research & Development*

**Goals:**

- Researching new and innovative disease treatments that offer a competitive advantage.
- Maintaining and improving efficiencies in drug development.
- Maintaining a strong network of community and company contacts to maximize [team work](#).

**“We need shared access to latest compound and patent information for research, real-time project status tracking for development, and more efficient ways to collaborate.”**

# Managing user interviews #1

## Project overview

The digital workplace will deliver a holistic set of platforms, tools and environments for work, delivered in a useable, coherent and productive way

There are four main elements of the digital workspace

- Communication
- Knowledge
- Processes
- Collaboration



## The interview

I would like to talk with you for no more than 50 minutes to understand how ABC Ltd works now, and how ABC Ltd needs to work in the future to maintain its global reputation.

Further information on the scope of the interview is given on p2 of this briefing document

I will not be recording or transcribing the interviews. Any comments you make will be 'off the record' unless you give me permission to quote you.

All the interviews will be brought together in a draft summary report which will be circulated to everyone I speak to. When you read the [report](#) you are most welcome to make additional comments.

## Consultant profile

By profession I am an information scientist, focusing on improving how information flows around organisations to enable employees to make better decisions

I set up Intranet Focus Ltd. in 1999, advising organisations on consulting on the design and management of intranets, information management strategy development and the specification, selection and implementation of content management and enterprise search software.



Most of my projects have been for multi-national companies, including Rolls-Royce, Atlas Copco, Ericsson Telecommunications, Hofmann La Roche, Bayer and Arup. I have business experience in almost 40 countries.

I have been a Visiting Professor at the Information School, University of Sheffield since 2001. I have written eleven books, including The Intranet Management Handbook (2011) and Enterprise Search, the 2<sup>nd</sup> edition of which was published in 2013

I live in Horsham, UK, which is close to Gatwick Airport

## Contact information

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Twitter intranetfocus  
Skype intranetfocus

# Managing user interviews #2

These are the topics that I would like to cover in our conversation. The timings are indicative, and it may be that we spend most of the time talking about just one or two of the four topics.

## A. Decision making 10-15 minutes

I'd like to understand how you make decisions. Some of these decisions may be made on a regular basis, and others as the need arises. Perhaps a technical problem has arisen with a product and a solution needs to be found.

I'm especially interested in situations where you need to find information from a number of different sources, especially when these sources are in other ABC Ltd locations, and perhaps in different languages

I'd also like to know where you store documents and how you find them when you need them

## B. Collaboration 10-15 minutes

Set out below are three different ways in which collaboration can be of value. Could you give me examples from your own experience, and talk about successes and problems?

### Document centric

Collaborative authoring, editing and discussion of documents or other content items, including sectional editing of large documents

### Conversation centric

Discussions to develop new products, solve production problems and respond to customer queries, taking advantage of the expertise of employees on your own site, and also at other ABC Ltd locations.

### Project centric

Collaboration around a very specific set of goals and objectives for a project. Usually there is pressure on achieving a result by a specific date.

## C. Digital workplace benefits 10-15 minutes

This is a list of some of the benefits that other organisations have gained from investing in digital workplace applications. In preparation for our conversation could you think about which 4 or 5 benefits would make the biggest impact on the business performance of ABC Ltd.

1. Reduction in business risk
2. Easier and more effect collaboration across the company
3. Increased speed and quality of decision making
4. More responsive product development
5. Easier to find people with specific expertise
6. Improved product and service quality
7. Faster speed of reaction to market opportunities and threats
8. Improved customer satisfaction
9. Efficiency gains – more work with the same staff
10. Unifying the organisational culture of Megger
11. Better customer retention
12. More effective induction and integration of new employees

## D. Anything else? 5-10 minutes

An opportunity to raise other issues or to go back to something we talked about earlier in the interview

# Managing user interviews #3



- Always, always, pilot test the interview format
- Never take verbatim notes – you lose eye contact
- Not everyone speaks fluent English
- Hand your pen to the interviewee towards the end of the interview
- Agree a summary of the interview before leaving
- Check back the summary a week later
- Keep the interviewee in the loop on project progress, though not on outcomes of the research

# Focus groups

- Focus groups seem to be such a good way of getting a spectrum of responses from a spectrum of people
- They are very difficult to manage and always need to be double-headed by the consulting team
- Always always pilot test
- They work best when everyone in the group is known to you already
- It takes only a single person with a personal objective, or new to the group, to wreck a focus group
- In general, it is best to use them to validate outcomes from one-on-one interviews and not as a primary source of information



# The definitive guide



## INTERVIEWING USERS

How to Uncover Compelling Insights

by **STEVE PORTIGAL** Foreword by Grant McCracken

**PR** Rosenfeld





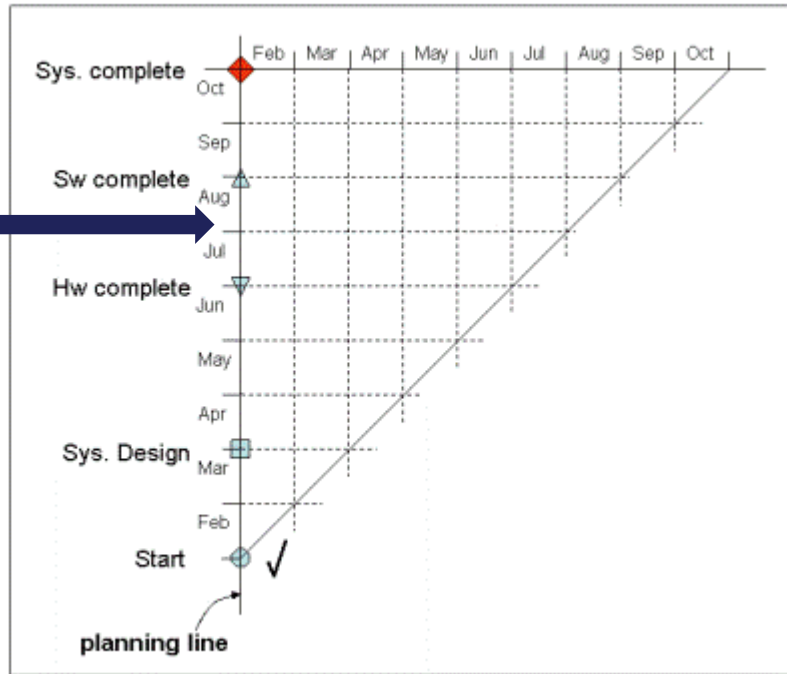
#6 How will I be able to keep track of the project?

Horaires d'arrosage  
de 19<sup>h</sup> le soir à 10<sup>h</sup> le matin  
Lundi: de ferreol à Couderc  
Mardi: de charmasson à Maby  
Mercredi: C<sup>te</sup> droit rigolette  
Jeudi: C<sup>te</sup> gauche rigolette  
Vendredi: Barrelet au terminus  
Samedi: de maby au terminus  
Dimanche: Côté Lavoisier

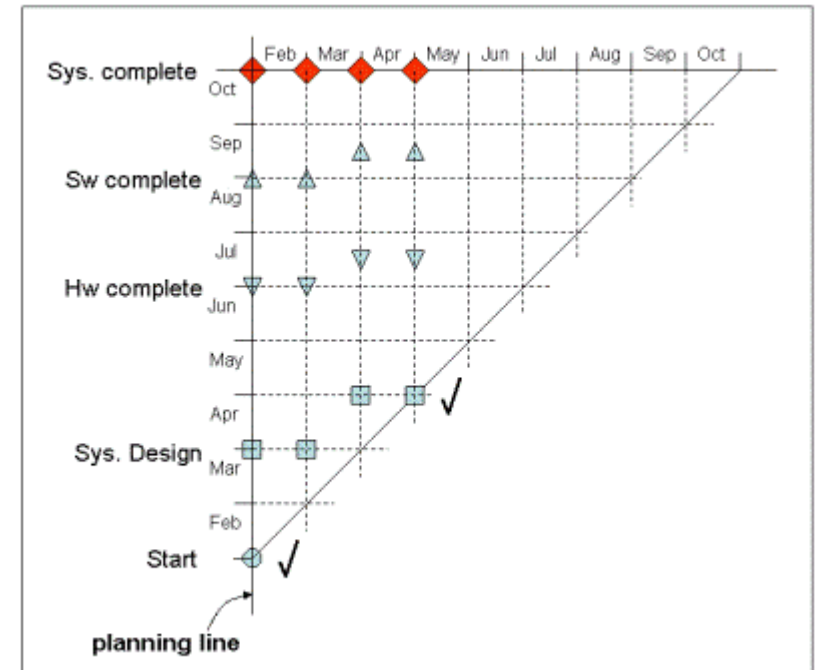
# Milestone trend analysis diagrams



The initial forecast



Forecast at Month 4



# Avoiding failure



# Can I offer some advice

1. Never assume that what worked in a previous engagement will work this time around
2. Never assume that all the relevant information has been passed on to you
3. Never try to out-maneuver the client – you do not know who their friends are and they make pay-days possible
4. Never close out an engagement without having established an enduring relationship with the client



# Achieving success



# My good practice suggestions

1. Be transparent in the partnership with your client. A consulting engagement should never become a game of power politics
2. Every stakeholder has to feel they have what they expected from the project
3. Make sure that everyone you meet feels that they are important to the successful outcome of the project
4. Recognise that circumstances and objectives may change day to day, and be ready with solutions



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# Some 'thank you's'

- Consulting companies
  - Business International/Creative Strategies International, Link Resources, International Data Corporation and Logica
- Consultants
  - Angela Abell, Howard McQueen, Steve Sieck and Peter Jackson
- Clients who taught me and allowed me to experiment
  - International Monetary Fund
  - United Nations
  - Boehringer Ingelheim
  - Hoffmann La Roche
  - Bayer
  - Atlas Copco
  - Open University
  - Addenbrooke's Hospital, Cambridge





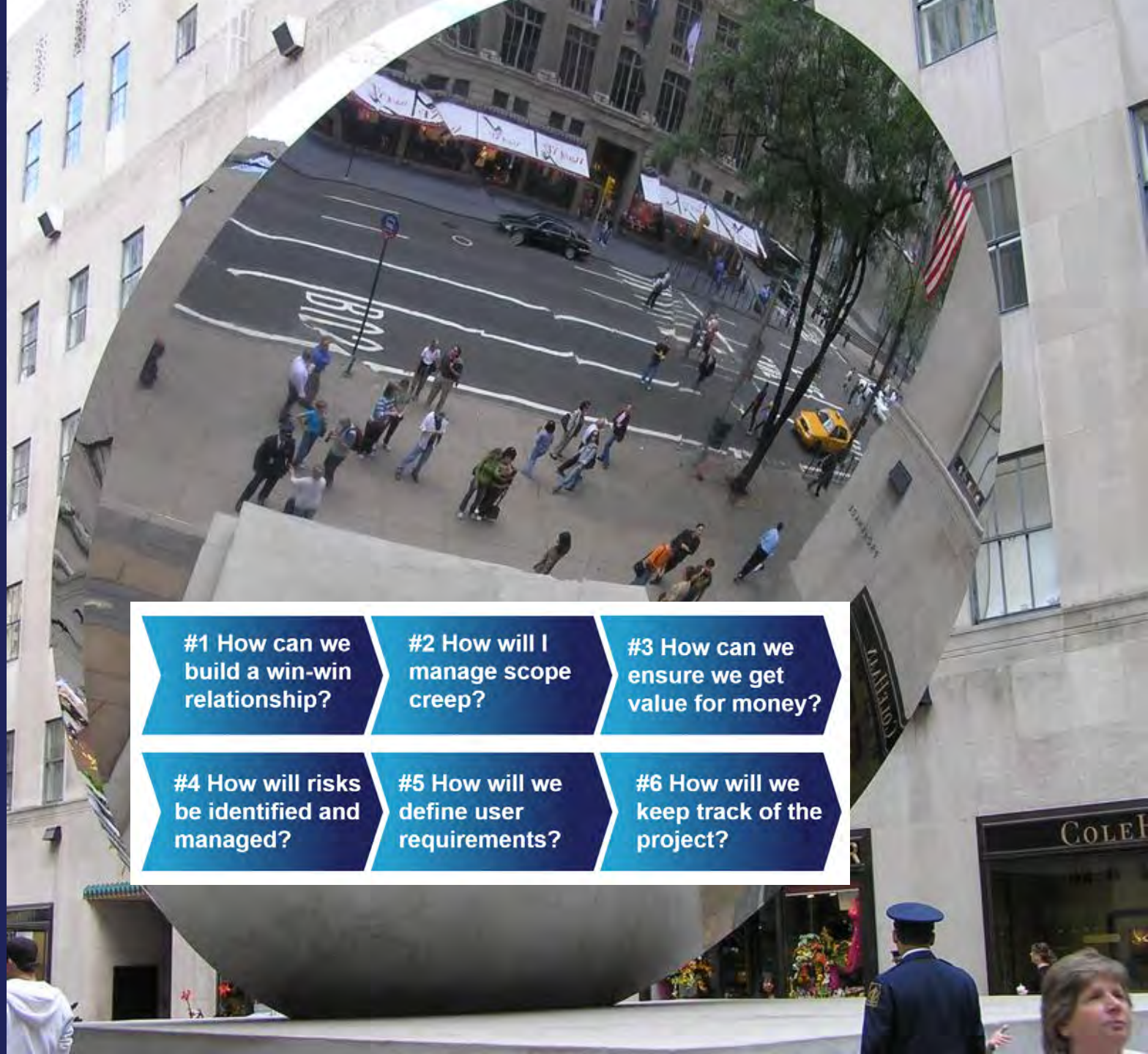
# Time for reflection

## MANAGING EXPECTATIONS

*Building Client-Consultant Partnerships*

MARTIN WHITE

intranetwerk



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