

# DIARY OF A CONSULTANT



Jeff and David refresh their thinking on how to address client issues.

By David Zahn

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*Jeff and I agree* to take time between Christmas and New Year's Day to relax, rejuvenate, and rev up for the start of our second calendar year as Clow Zahn Associates, but I squeeze in one last meeting with a potential client on the morning of Christmas Eve. I'm not sure whether that makes me the Grinch or Santa Claus for possibly bearing gifts to the family if the prospect signs.

December 24

*Upon entering the deserted parking lot* for the quick meeting, I think of how often Jeff

and I have done this alone and together. The typical scenario: As we pull up outside the client's office in a rental car reeking of stale cigarette smoke, Jeff usually says, "The pros from Dover are here (referring to us)." Invariably, that makes us chuckle as we rarely look professional with not enough sleep and slight indigestion from the hotel's continental breakfast. Yet, a transformation occurs as we yawn our way across the parking lot to the building entrance. The adrenaline starts to flow, and we discuss the material we're going to cover. It's "show time." Jeff and I try to approximate the look of a duck: serene to the eye above

the water but paddling with all our might below the surface.

I've been asked by many readers for advice. Here are some lessons we've learned about the crucial elements.

**Experience.** Clients want to work with consultants who have done it, seen it, avoided it, and managed it before. It's no surprise that people are conservative with their budgets when it's time to select a consulting partner. It's no exaggeration to say that careers are on the line, based on the success of choosing a consultant. So, few clients will decide based on whether or not they like you. They want to feel reassured they've hired a consultant with experience in handling problems similar to theirs. Saying that you've worked for 42 of the top 50 consumer goods firms over the past 10 years is a lot more reassuring to a potential client than saying you're sincere and hard-working and believe in the value of partnering.

**Courage.** There'll be times when you won't know the best approach. Other times, ethical decisions have to be made. (Do I tell the person who hired me that she's the reason performance is suffering?) And there will be times when telling someone the unpleasant truth might lessen your revenue potential. Still, being objective and forthright is mandatory in this business or the word will get out that you're a revenue chaser.

**Open communication and trust.** As partners, there are no secrets between Jeff and me. We discuss every check, sales call, and expense—at least those over \$25; I don't feel the need to know if he super-sized his lunch. We have a good portion of our futures tied up in each other's activities, and we trust that the other will behave accordingly. We don't allow conflicts to simmer. We thought long and hard about how to structure our partnership, and we agreed it was necessary to share thoughts and ideas. That has helped prevent conflict and resolve issues that do crop up.

## Clients want to work with consultants who have done it, seen it, and managed it before.

At a recent facilitation we conducted, the client praised Jeff for doing an extraordinary job. I thought Jeff had done a good job but had seen him do better. When Jeff asked me what I thought, I told him I'd give him an A-. He was mildly perturbed but appreciated the candor—perhaps not right then and there, but he valued my insight later.

**Sales skills.** Given that the focus of our consulting practice is skewed towards sales training, our credibility would be nil if we had poor sales skills. It's rare to observe how competitors sell, so we've relied on Michael Bosworth's book, *Solution Selling*. His commonsense approach covers presentation skills, cold calling, calculating return-on-investment, and more.

Another way we stay current is to ask clients why they hired us or why they didn't. That usually provides useful information.

**Consulting skills.** We like Alan Weiss of Summit Consulting for his approach and specific tips. In fact, I don't go for more than three months without thumbing through Bosworth's book or one of Weiss's.

**Trade journals.** I use airplane time to read industry-related material: *T+D*, *Training*, *Consulting*, *Home Office Computing*, *PC World*, *Fast Company*, and a spare *Newsweek*, *Time*, or *U.S. News and World Report*. I read the *Wall Street Journal*, *New York Times*, and my local daily newspaper. It's important to keep up with technology and expand one's reading beyond training-related material to maintain a larger view of issues and be better aware of what clients are reading. Many times, clients have asked whether I saw an article in the *Times* and want to talk about it. I've wondered whether it's a test to see if I'm "just a trainer" or also conversant in business.

**Books.** Howard Shenson's books on contracting and consensus are good, as are Peter Block's books on intervention skills. From my perspective, consulting is a business and not an academic lab. If a book is devoid of the hard realities, it's not likely to help.

**Websites.** I receive regular downloads of online magazines and newsletters with industry topics. Here are a few:

- <img alt="globe icon" data-bbox="675 408 695 420"/> [www.individual.com](http://www.individual.com). Lets you select areas of interest and request daily downloads of articles across a wide spectrum of publications.
- <img alt="globe icon" data-bbox="675 468 695 480"/> [www.office.com](http://www.office.com). Emails of small-business info such as office setup, tax preparation, and so forth.
- <img alt="globe icon" data-bbox="675 515 695 527"/> [www.prosavvy.com](http://www.prosavvy.com). A matching service with potential clients and projects.
- <img alt="globe icon" data-bbox="675 545 695 557"/> [www.guru.com](http://www.guru.com). Helps consultants find people needing consulting services.

We also subscribe to office superstore sites for savings offers and browse sites of associations, competitors, strategic partners, and complementary providers. Jeff and I are forever sending links back and forth.

The life of a consultant is a constant re-creation of skills, introspection, and critical analysis. The bane of any consulting firm is that it grow stale by recycling old ideas and lose its relevance.

As I enter my meeting on Christmas Eve, I think of the Jackson Browne lyrics: *I wander around backstage until the lights come up, and we hear that sound and we remember why we came.*

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