



**Best Practice Guide**

**Five Steps to**

**Consultant**

**Engagement**

# Many consulting organizations start out with a strong team culture

People know each other well and they communicate easily through informal structures. But as the organization grows beyond a certain point, this approach starts to come under pressure and problems start to emerge.

Assembling teams of skilled resources to deliver appropriate engagements involves more people, projects, locations, and time zones. As this becomes more complex, consultants may feel they are being slotted into engagements at the last minute, perhaps where they don't have the right skills or experience, or are not with people they can from. They may feel they don't have much control over their own career progression.

This can cause a vicious cycle, where projects veer off plan, start dates slip, and consultants don't have clarity about what they will be working on and when. Consultants may feel they are constantly fire fighting and managing crises. This is exhausting and can lead to burn out or high rates of attrition.

A first step to hiring and retaining talented professionals, is to take a step back and look at the organization from the consultants' point of view. Do the service professionals on the ground feel they are part of a "one team" culture? Do they understand and share the vision for the organization? Are they being supported to work at a steady and productive pace? Are they able to develop new skills? Can they express interest in particular engagements?

Our premise is that being part of a winning team where people feel supported and enabled to do their best work on an ongoing, sustainable basis, is more engaging than any number of add-on engagement initiatives. This Best Practice Guide suggests some steps towards ensuring that the organization "works" from the consultants point of view.

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*Business leaders  
set clear objectives*

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## 1 Share the Vision

An important role of the business leadership is to help set the strategic direction of the company and to support teams of motivated individuals to deliver on that vision.

Building a great business starts with building a great team. That requires a sense of working together towards shared objectives and goals. If there is confusion about what the priorities are, that makes it more difficult for consultants or other service professionals to feel that they are contributing effectively to meeting them. That leads to frustration and disengagement.

In BPA 'Measure what Matters' we explained the importance of establishing what success looks like and putting it into numerical format. But the strategy should not be entirely about numbers and targets. It is more engaging to express targets in terms of customer experience, satisfaction, churn rates and so on. Expressing targets in terms of customer success creates a stronger and more unifying vision.

Consultants, and other employees such as sales people and project managers need to have clear insight into the part they play in the company's success. That will help them to work together to realize it.





## 2 Foster Open Communication

Share information and also listen to consultants. Give them a role in selecting the engagements they want to work on.

The business guru John Harvey-Jones once said “No-one goes to work wanting to do a bad job, we just put so much red tape in their way that they give up trying.” Transparency is important on many levels. Sharing relevant information about engagements and customer relationships helps individuals to succeed in their roles.

It is also important to encourage consultants to contribute information, from what projects they might be interested in working on in the future, to comparing how long it actually takes to complete tasks against the plan to avoid lowballing estimates in the future.

Enabling consultants as far as possible to manage their career progression, building skills and experience in a way that suits them supports engagement. Set the expectation that employees should aim to add at least one new line of experience or skill on their résumé each year. This challenges both the individual and the organization, and ensures that employees are encouraged to continue growing and developing.

*Information is a  
two-way street*

## 3 Create self-organizing teams

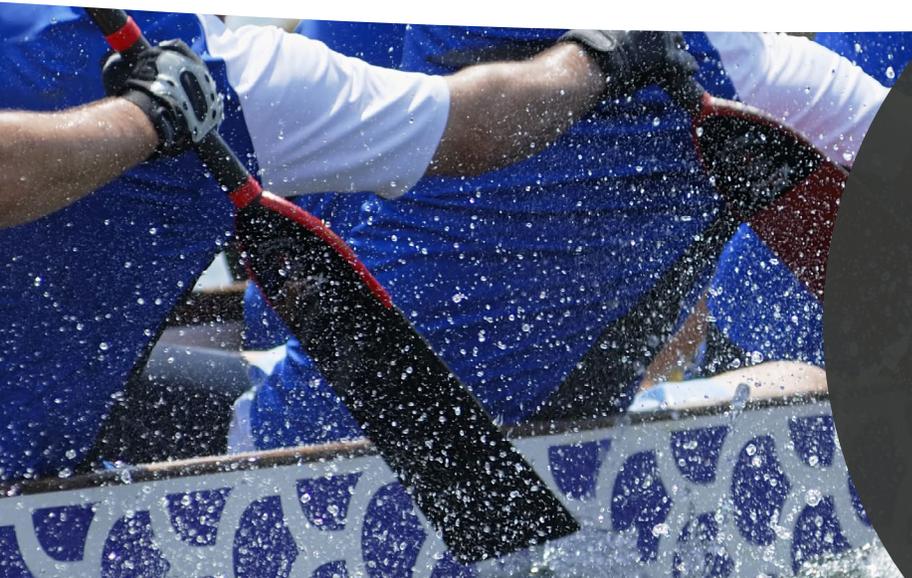
Operate a “high-trust” network —concentrate on providing intellectually-stimulating work for high-performance teams.

Many businesses at the foundation stage operate in so-called “high-trust networks.” They are made up of people who understand the company’s culture and who share its goals. Rapid growth (perhaps onboarding many new staff) can have the effect of shifting the culture towards a more “low-trust network.”

Where this happens, because of concerns about errors arising, managers assume a more supervisory role. That can be difficult for existing staff who may dislike the change and decide to leave the organization, further compounding the problem.

Utilizing technology, such as augmented intelligence, can help to sustain what is effectively a high-trust network, but one with greater visibility and accountability. Within this structure, self-organizing teams can take control of things that can affect their success, such as budgets and goal-setting. This enables them to make swifter decisions and encourages collaboration at all levels across the organization.

Using automation to provide insights to newer employees, supports them to work at the level of more experienced people, guiding them towards expected actions. This reduces the risk that people are going to miss important actions or to make wrong decisions. This allows the business to maintain the kind of culture that will attract and retain top quality talent as the business expands. It also allows the business to focus on offering the kind of challenging and intellectually-stimulating work which attracts highly-motivated individuals and sustains high-performing teams.



*Build projects around motivated individuals and support them to succeed*

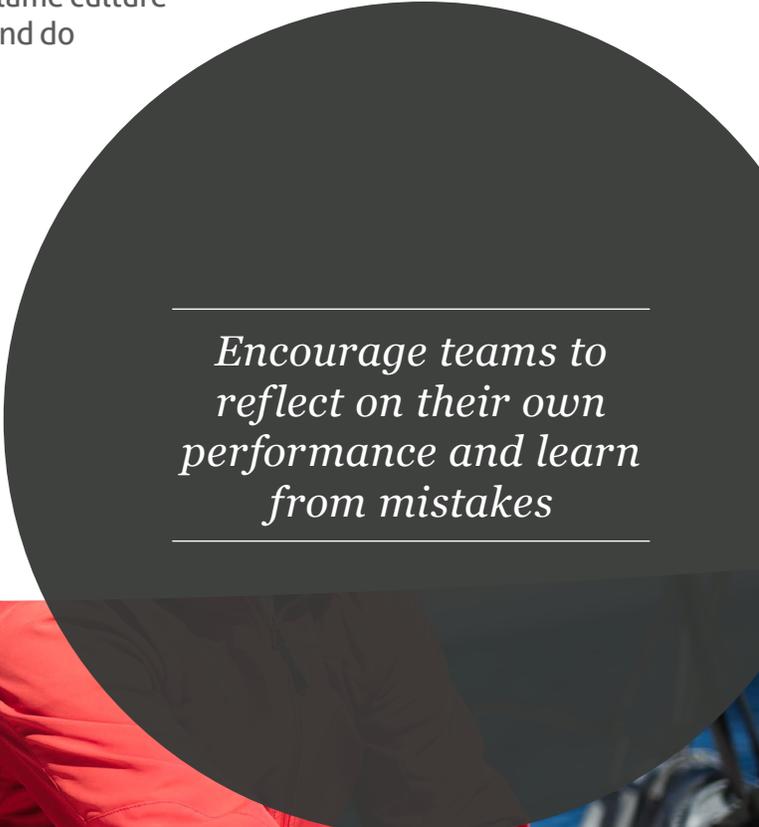
## 4 Regularly Review Performance

Self-managing teams move fast, they constantly plan and replan to take account of changes on the ground and new information. They make decisions quickly without waiting for orders to come from the top. In this context, delivering individual feedback in the form of a performance review once or twice a year is no longer dynamic enough.

In the past, bonuses and incentives were also often attached to individual targets. But that isn't always appropriate. When it comes to sales, for example, targets are traditionally biased towards new customers. However, if existing customers are a big source of repeat and new business, then the team which has been nurturing them and providing the service that is bringing them back should figure in the reward.

But incentivizing the right behaviors isn't just about bonuses. It is also about creating a culture where people feel that their contribution is recognized and where everyone can take credit for success. Managers can encourage teams to regularly review their progress and look for ways to improve. It is not helpful to have a blame culture — where things don't work out that is a chance to learn and do things better next time.

For instance, telling everybody in the organization that they are falling behind on their targets is not going to create a motivated team. The role of managers is to encourage teams to regularly review their progress, to share the up to date and accurate information that will enable them to do that, and to learn the lessons of what didn't work.



*Encourage teams to reflect on their own performance and learn from mistakes*





*Harness the  
competitive  
advantages  
of change*

## 5 Respond Constructively to Change

Dynamic businesses undergo constant change - consider how best to manage that from consultants' point of view.

It is sometimes said that change is the only constant. Customer requirements, projects and markets are all likely to undergo change. Every services business also undergoes change in ways of working, propositions, personnel and so on.

When change is contemplated, it is important to consider the consultants' view. For example, when selecting and implementing new software. The goal may be to enable the business to create more visibility and to be run in a less hierarchical way. But it is important to involve people across the business in the selection process rather than imposing this on them. People in different roles will need to be clear about how it will benefit them.

Sometimes managers direct most of their energy towards the people who are resistant to change. Instead, they should focus on the individuals who are enthusiastic and provide them with support and resources. In the right role, these people will be able to champion the change and enthuse others.

Change also looks different at different stages of the employee journey. As new people come on board, how easy is it for them to understand the company vision? New people who arrive midway through a process change which is not yet embedded may be less invested in it. How does it work for them? Equally, if someone who was leading a change leaves, the succession will need to be managed in a way that doesn't mean the process slips back.

## Conclusion

Highly- skilled professionals want to do their best work. They want to develop skills and talents and to be part of a great team. That experience is highly engaging. Consultants want to develop their skills and experience in the direction that suits them, and they want to work at a sustainable and productive pace on appropriate engagements where they can deliver customer success. Organizations which can provide this kind of employee experience are in a better position to recruit and retain high-performing individuals.

## Kimble Best Practice Example – Entero AG

German management consulting organization Entero AG uses Kimble to support a more autonomous and self-managing workforce. Engagement managers are responsible for maintaining the commercial outcomes of their projects. A review process ensures that the margins or rates they are presented with are sustainable and fit in with company policy.

Director Heiko Frank said: "Kimble helps us to keep track of everything. One person might be involved in ten projects - that would be almost impossible to organize if we didn't have professional services automation. It increases our productivity."

After introducing Kimble, chargeable work levels increased 3-4 percent as a result of behavior changes across the company.

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