

Practitioner's Corner

Now That You've Been Called: 8 Principles of Successful Consulting

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Consultants are called to a myriad of responsibilities on both a professional and personal level. In today's society, where time is of the essence, serving with clarity of mind and a focus on purpose will prove beneficial to all involved. Identifying exactly what it is that you are called to do through your consulting practice will provide a balance and truth in both worlds. This article provides basic guidelines for maximizing your vocation as a consultant through introspective, intentional, and altruistic action.

Consultants are called to provide expert advice or opinion to others concerning professional or personal matters. Effective consultants will guide themselves as well as their clients in sanctioning the advantages found in a commitment of time, responsibility, and attention. In addition to this trilogy of benefits, the most successful consultants recognize that consulting is a vocation. Building on this notion of consulting as vocation, the following principles address critical aspects of consulting success. Each principle addresses a professional need that may be worth sharing with your clients.

One: Be True to Yourself

Have a golden rule for your consulting practice. Know *what* you are called to do and *why*. If you have more than one vocation, prioritizing them is important. Priority should not necessarily be given to the task that will yield the most monetarily. Rather, the choice should be made on points of principle and centered on your cardinal values. Take the time to embrace the duties, responsibilities and time commitment required of your vocation. Once you have made this discovery, know where to draw the line and do not cross it. Never compromise who you are or what you believe in to please others. Establish a baseline of non-negotiable core values.

Two: Know if the Time is Right

One source of frustration is striving to complete goals at the wrong time. It is our responsibility as consultants to recognize the significance of time. An ability to know if this is “our season” will also prepare us in guiding our clients. It is not advisable to push past obstacles or advise clients to do the same if the attempt is being made in the “wrong season.” So how do we differentiate between the two? Take an inventory. Are the people and responsibilities in your life being compromised because of your goals? Are you able to balance the other competing priorities in your life? If you have answered yes, then you may freely push past the seeming obstacles. Success will come with perseverance. However, if there is an imbalance in your life and matters such as family, friendships, and spiritual values have not been settled, perhaps now may not be the time for you to complete proposed changes. Recognizing when the time or season is right will help alleviate the frustration that comes from being misaligned to your purpose.

Three: Make a Commitment to Excellence

Excellence here does not mean without error. It refers to striving to do and to be the best at all times, operating within a framework of integrity. It is about living up to your full consulting potential. Beyond the professional terms laid out in the contract with your client, a commitment to excellence embraces confidentiality, character, and punctuality. Be enthusiastic about your mission! Independent or freelance consultants who operate their own businesses get to set their own hours. This can be a double-edged sword, unless you make a commitment to excellence. Build this into your standard operating procedures, anything less than excellence should be firmly resisted. Who wants to be known as a mediocre consultant! A commitment to excellence means that you are more likely to be taken seriously.

Four: Maximize learning

While consultants are often seen as the experts, the truth is that there is always a lot to learn. Begin with the knowledge that you do not know everything. This should lead you to build up your knowledge base and increase your overall marketability. Consultants are in the knowledge business. This is the mainstay of their ability to offer advice to clients. Expertise is not developed overnight. It is nurtured. The message then is to learn all that you can about your particular branch of consulting and any related arenas. This is especially important if you are thinking of pitching for work in an area that may be less familiar to you. The truth is that the best consultants, whatever their consulting niche, are also well rounded professionals. There are numerous opportunities to take training and certification classes to increase your knowledge. Where appropriate, you may even encourage your clients to do the same. Be careful not to proceed from a perspective of dissatisfaction, but rather from your ability to continue and grow. Be on the constant lookout for relevant seminars, workshops, and training sessions. You will discover a fascinating world of growth opportunities.

Five: Satisfy What Others Need

Consultants are sometimes accused of pursuing their own agendas. Apart from the obvious problem of departing from a contractual obligation, it is worth remembering that consultants are in the service business. If you do not know or are unwilling to satisfy the needs of your client, you may be in the wrong business. Consultants who arrive at a client site or who approach a problem with their minds already made up as to the solution, fail the client and themselves. Be aware that what you want out of the consulting relationship may sometimes prevent you from seeing what the client needs. An ability to separate your wants from the client's needs is an important step in building the consulting relationship. Beyond the usual differentiation of consulting opportunities on the basis of work hours involved, level of expertise required, niche market and of course monetary reward, consultants should also look for opportunities to go beyond the proverbial call of consulting duty to making a difference in the life of the client. This is where satisfying a deeper need comes into its own. Again, from a relationship perspective this could become your unique selling point, helping to distinguish what you offer and are able to do from other consultants.

Six: Perform a Reality Check

Understand that we are not called to *perfection*. We do not live in a perfect world. We will make mistakes and there will be disappointments, even as we strive to do our very best. Be accepting and kind to yourself and to others when errors occur. The important thing here is how you react in these situations. The example you set for your clients will teach them that failure to meet a goal should not always be interpreted as defeat. Neither does it mean that we have failed personally. When things go wrong, see it as a learning opportunity. Revisit the project or your proposed solution and tweak the rough edges as necessary. Do this with an honesty of purpose and professional commitment to the excellence spoken about above. While performing the reality check, remember that neither performance nor excellence are about perfection. It is your ability to get up and try again (hopefully, within cost) that will demonstrate your commitment and strength as a consultant.

Seven: Stay in Your Lane

This is about staying focused and not drifting off in too many other directions. Sometimes it can be tempting for a consultant to get caught up with additional issues that are uncovered in the course of a primary engagement, even if these are tangential to the problem at hand. Resist the urge to lump every problem together or to remake yourself as a universal crusader. Unless you have a very lucrative consulting contract, chances are you have not been called to solve the problems of the world or offer solutions to every problem your client has. Staying in your lane is also about discipline and control. Establish boundaries. If necessary write them into the contract. There can only be one driver or project manager. Understand your role and stay focused. Encourage your client to do the same. Unless specifically invited (a rare feat), do not recast yourself as the client's CEO. As a consultant your duty is to provide clients with the proper guidance, motivation, and information. Stay in your lane and encourage others to do the same. This minimizes conflict and role strain.

Eight: Due Diligence

There are no shortcuts to this rule. As many a consultant has learned to their detriment, the consequences of ignoring this rule can be painful in the extreme. Just as consultants bring their experience, training and commitment to each assignment, so too must they commit to a process of due diligence or the “discovery” process as the more legal minded might call it. Effective consulting is predicated on uncovering as many facts and details as possible. The idea with due diligence is to both seek out information that may assist the consulting process, as well as reduce the risk of being compromised by one’s ignorance of pertinent facts. Ultimately, the emphasis on due diligence speaks to the issue of being a diligent consumer of information and more generally, one’s consulting vocation. The cost of due diligence is usually assessed in terms of the time, focus and commitment made to specific client goals. However, the potential rewards are tremendous.

Conclusion

Serving effectively in consulting comes by way of learning how to be true to one’s own purpose. This is a task that requires time, thought and steadfastness. Knowing which projects to decline will be equally as important as knowing which to accept. A successful consultant will ask themselves the tough questions in preparation for posing those same questions to their clients. Now that you have been called to the world of consulting, remain in tune with the original heartbeat of your business. Ask yourself why you were called to the vocation of consulting in the first place. Your answer will show you which track to remain on as you excel in your consulting practice.

About the Author

Nicol King, M.A., is the president of TriCord Consulting, LLC, an organizational development and leadership training company that provides customized seminars and workshops to meet the needs of entrepreneurs and small business owners. It offers management consulting, personal and professional leadership skill assessments, as well as coaching and direct placement services to entrepreneurs, corporations, non-profit entities, and businesses of any size. Most recently, Nicol developed a seminar called, “*Employee Retention: What You Need to Know to Keep Your Top Performers and Create New Ones.*” For more information, please visit www.tricordleader.com
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