

Knowing how to establish customer rapport and manage expectations can mean the difference between a project's success and failure.

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IT Consulting: Communication Skills Are Key

Information technology is big business across the globe. The Gartner Group's forecast for IT services growth through 2009 is a healthy 6 percent annually, which will culminate in \$796.8 billion of business worldwide (http://www.gartner.com/0_admin/quickRegInfo.jsp). IT consulting services are a good chunk of that, with billions being spent on consultants from single individuals to multibillion dollar companies. Such services aim to provide companies with an objective view in diagnosing, analyzing, and resolving business-related technology problems. IT consultants are professionals who have joined an existing consultancy or have established a consulting business as a single individual or with colleagues. Regardless of their origin, IT consultants perform a variety of tasks, from idea generation to design to project management support.

With this much diversity in a lucrative market, it helps to understand what contributes to IT consulting success. Chief among the success factors is effective communication—an idea that seems to have eluded most of the research purporting to help IT consultants. This is curious, since the essence of consulting is managing a business relationship

between a customer with a need and a consultant that can support the need. If the two parts of that relationship can't

communicate effectively, how can the relationship, and by extension the consultancy, succeed?

We believe that well-honed communication skills are critical to an IT consultancy's success—whether a large business or a single person. The nature of consulting demands that its practitioners be able to communicate with customers and maintain a productive customer relationship. Both these goals require specific skills, such as being able to anticipate concerns and respond sensitively to needs and expectations. These are the elements of effective communication.

CUSTOMER COMMUNICATION

IT consultants must be proactive in opening communication lines with customers. In part, this is to avoid potential pitfalls, disappointments, and frustrations that can lead to failure, but it is also in keeping with the consultant's primary goal: to provide services that guarantee customer satisfaction throughout the cycle of customer engagement and interaction. The extent of that satisfaction is often contingent on the customer's expectations about the IT consultant's role and contributions.

Ensuring that expectations are clear is a major benefit of effective communication because it helps minimize the damage from an outcome in which the customer is unhappy. Auditing is an

Inside

Resources

Adapted with permission from *Communicating as IT Professionals*, by J. Liebowitz, W. Agresti, and G.R. Djavanshir, Pearson Prentice Hall, 2005.

area that requires this clarification skill, and more organizations are now retaining IT consultants as auditors. Some want additional assurance that they are effectively managing costly IT projects, such as major system conversions. Others might be looking at audits to comply with legal and regulatory mandates. For example, provisions of the Sarbanes-Oxley Act, which became effective in 2004, require auditable systems for recording transactions and archiving business communications. Because IT permeates a variety of business practices, IT consultants are a natural auditing resource.

If, as an IT consultant, you are called on to be an auditor, both your oral and written communications must reflect the highest ethical principles. Your audience could be boards of directors and law enforcement, so it is vital to present honest and forthright representations of your auditing activities. Often, such activities can be complicated and you end up relying on judgment to make the best use of writing, speaking, and listening. The trick is to apply these skills in ways that respect the formal contractual relationship while retaining an informal style that sends a clear message: you are part of the team and will work as diligently toward the project's or job's success as if you were an employee.

Establishing rapport

People communicate best when they have a natural rapport—a behavior that is usually more subconscious than conscious. Historically, the advice for establishing rapport is to mimic the other person's behavior as you are talking. In modern customer relationship management, rapport means knowledge that you and the other person have some kind of similarity and synergy. In the day-to-day work environment, this means being aware of the customer's values and expectations. Through listening and observing, you can learn to anticipate how the customer thinks, behaves, and communicates under different circumstances. With this knowledge, you can align and synchronize responses to customer behaviors and communication styles. Maintaining a keen awareness of a customer's words and behaviors will provide insight into the underlying expectations. Your overall behavior, discourse, and communication styles should always be in sync with the customer environment.

In its Powerful Professionals workshops, Murray Hiebert & Colleagues recommends these rapport-building practices:

- Use informal and congenial conversation to reinforce your working relationships. Try to slant informal topics toward your customer's interests.
- During business conversations, strive to better understand your customer's interests, perspectives, needs, and

expectations. Ask open-ended questions and listen attentively to the responses to understand customer priorities and assumptions about the assignment. This will help you develop deliverables to satisfy your customer's expectations.

- Respect people's sociocultural values and communication styles. Be flexible and open and make sure that no one perceives your communication as disrespectful, hurtful, or insensitive. Seek opportunities to learn more about diverse cultures.
- Try to establish informal communication styles as much as possible. They will be influential in developing rapport.

Determining needs

Learning about customers often involves drawing from multiple and diverse sources. Eliciting facts and figures from documented material rather than interviews can save time,

but it misses an opportunity to win project support and build rapport. By listening attentively in an interview, you might discern signals about promising future directions. Asking the right questions can be somewhat challenging. A simple rule is to ask specific questions, but question asking as a skill has much more depth. It is the art of seeking clarification, verification, or motivation:

Questions aimed at *clarification* seek to identify and avoid inconsistencies. As an IT consultant, you might have reviewed interview notes and wondered if what you had heard was accurate. At that point, you most likely either made an assumption about the notes or contacted the person for affirmation. Both of these strategies are risky. Assumptions could be wrong and lead to a defective product, and contacting the person to ask a follow-up question could interrupt that person's activities. A compromise is to make the assumption, but simultaneously enter it into an online log of items that you need to check. If you are going to see the person again soon, you can then confirm your assumptions informally knowing that you are not going to be an interruption.

Questions aimed at *verification* seek to confirm critical information. These questions are no substitute for failing to listen. It is best to reserve verification questions for important matters, for which there are significant consequences if you get it wrong.

Questions aimed at understanding *motivation* seek to reveal the underlying reasons for an answer or statement. If you record only the answers given, you might wonder later why the person gave that answer. Asking a why question at that moment could elicit a response that implies a core underlying need. This revelation could lead you to suggest a way to address that need, which can only enhance customer engagement.

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Resources

- ▶ “Checklist for Establishing Rapport,” *Powerful Professionals: Getting Your Expertise Used Inside Your Organization* (http://www.powerful2lead.com/rap_chek.htm).
- ▶ “Issues Concerning Consultant–Customer Interactions: Things I Learned at the Information Center,” I. Dimakos (<http://www2.sas.com/proceedings/sugi22/training/paper323.pdf>).
- ▶ “Proposal Writing Authority,” N. Garlock (<http://www.proposalwritingauthority.com/rfp-response.html>).
- ▶ “Sarbanes-Oxley Cheat Sheet” (http://news.com.com/Sarbanes-Oxley+cheat+sheet/2030-7349_3-5465172.html).

Additional Reading

- ▶ “Auditing System Conversions,” D. Swanson, *IT Audit*, vol. 7, Mar. 1, 2004 (<http://www.theiia.org/itaudit/index.cfm?fuseaction=forum&fid=5495>).
- ▶ “Effective Communication with Customers,” A. Italo (<http://www.mindspring.com/~italco/com.html>).
- ▶ “From Design Services to Strategic Consulting: Improving Core Competence of Finnish Design Consultancies,” J. Hytonen, J. Jarvinen, and A. Tuulemaki (http://akseli.tekes.fi/opencms/opencms/OhjelmaPortaali/ohjelmat/MUOTO_2005/fi/Dokumenttiarkisto/Viestinta_ja_aktivointi/Julkaisut/kmkp_raportti-.pdf).
- ▶ “Internal vs. External Consulting,” H. Wesselius (http://www.vault.com/community/v_community_main.jsp?mod=article&vcm_page=1&ch_id=252&article_id=2184397&mod_id=363&listelement=3).
- ▶ “Rapport,” World Transformation (<http://www.worldtrans.org/TP/TP1/TP1-36.html>).
- ▶ “Steps to a Successful RFP Response,” F.C. Wagner (http://www.imakenews.com/sugarcrestreport/e_article000014193.cfm).

RELATIONSHIP MANAGEMENT

The consultant–customer relationship is extremely sensitive, with many avenues for possible misunderstanding and failure. A common mistake is to point out everything that is wrong. Some consultants view this as a way to exhibit their skills and knowledge and thus prove their competency to the customer. However, in most cases, this approach serves only to create a negative mood among managers and employees as soon as they start a project, which tends to make the consultant unpopular.

A more effective strategy is to look for opportunities to compliment the work of employees and show respect for them in front of their manager. Do this sparingly, however, and only when it is genuine. If you work with employees to solve problems and develop solutions, be sure to share the credit. Relationships based on professional behavior and effective communication will show you to be a team player and will build rapport with both employees and management. This in turn improves customer–consultant synergy and makes the entire work environment more positive.

Managers at the customer site expect you to work diligently and efficiently according to the agreed-on plan, schedule, and cost. An important part of that expectation is status reporting. Management must be up to date on project progress and changes. If the plan does not establish a progress-reporting process, ask the relevant manager what reporting content, frequency, and style is preferable. If scope creep occurs—if your work is leading to topics beyond the statement of work—inform management immediately. Taking prompt action will avoid any surprises and unpleasant events. Finally, respect all confidentiality agreements and the privacy of customer information.

Anticipating concerns

Familiarity with the customer organization and its associated technologies, products, and services can greatly enhance the ability to anticipate customer concerns. All IT consultants must look at issues from the customer’s perspective and strive to take on the customer’s value propositions as a gauge of product value and benefit. To be consistent with that goal, you should strive to develop and present solutions that are based on the customer’s requirements, expectations, standards, and terminology. Ideally, this means knowing what customers want, when they want it, where they want it, and if appropriate at what price they want it. This depth of understanding will help you anticipate customer concerns and consequently prepare effective responses.

Be vigilant in maintaining scope, however; anticipating concerns does *not* mean adding to the statement of work. An often cited source of dissatisfaction with IT consultants in general is their tendency to steer projects toward technologies or subjects that they, not their customers, find interesting. Make sure that any work you do is consistent with the customer’s expectations and interests.

Hurdle model. To better understand what customers expect, it helps to learn more about the interests across the

customer's organization. Interests among the various groups are often contradictory, and you will need some way to sort through them. One method is the Hurdle model (J. Hytonen and colleagues, "From Design Services to Strategic Consulting: Improving Core Competence of Finnish Design Consultancies," 2004; http://finnishdesign.fi/files/fide/tutkimukset/kmkp_raportti.pdf), which its creators proposed to help the idea-to-product development process, but which can extend to fit IT consulting needs. The model acknowledges that at some time during product development, customers must decide if they should turn an idea under consideration into a marketable product or service. This decision point is the *hurdle*, which gives the model its name. In some companies, people working before the hurdle and people working after the hurdle have totally different responsibilities, interests, and viewpoints. Often, the main responsibility of those working before the hurdle is to create new ideas.

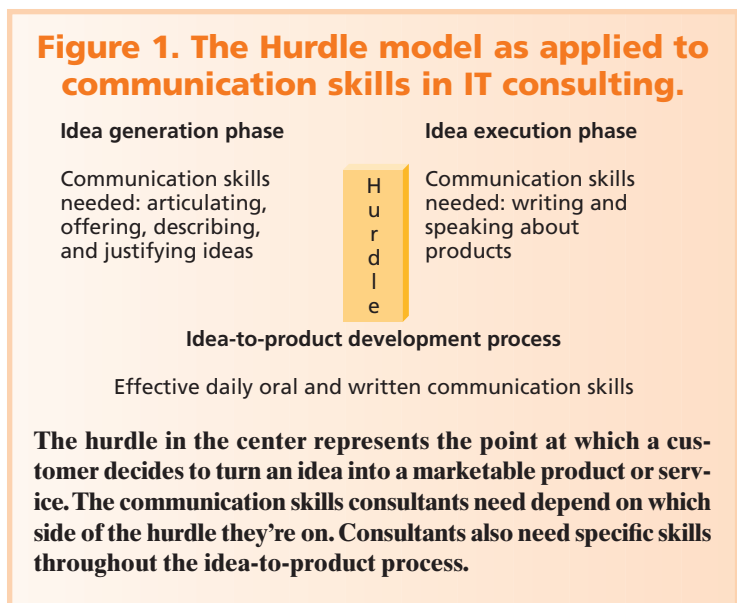
Applied to IT consulting, the Hurdle model offers interesting insight. Before the hurdle, the customer is more likely to welcome the consultant's proposed new ideas and initiatives and receive them as possible business opportunities. After the hurdle, the customer is likely to view the same ideas as potential threats and risks. For a software developer working toward a fixed delivery date with milestones to be met, a new suggestion represents a risk that the schedule, cost, or both will slip. The message is to recognize which side of the hurdle you're on so that you can better understand your customers' viewpoints, obligations, and expectations.

Figure 1 shows the Hurdle model applied to three categories of IT consulting services and the services associated with those categories:

- *Idea generation (before the hurdle)*. These services relate to generating and discussing ideas, and making the decision to turn an idea into a product.
- *Idea execution (after the hurdle)*. These services involve executing the chosen idea—typically the design, development, test, integration, implementation, styling, and marketing of the product.
- *Project management (both sides)*. These services involve supporting the process of turning an idea into a product, including scheduling, cost-risk analysis, and staffing.

Idea generation. In the idea-generating environment, IT consultants must be able to create new ideas and articulate and communicate them effectively. First, they must offer new ideas. Customer organizations expect their IT consultants to be creative and to offer fresh ideas that are based on potential opportunities and technology trends. Effective communication of the new idea includes but is

Figure 1. The Hurdle model as applied to communication skills in IT consulting.



not limited to describing its anticipated costs, benefits, and risks.

Second, IT consultants must provide rationale and reasons to *justify proposed ideas*. Oral and written communication skills are a must. The focus is to offer external insights and views about the customer's ideas. Customers usually appreciate the fresh perspective of an external IT consultant, which provides objective analyses and insights about the ideas.

Idea execution. Turning a selected idea into a product requires specific knowledge about various information technologies, products, applications, and product design and development processes. It also requires knowledge of product usability, maintainability, styling, and marketing. IT consultants should be able to use the customer's product terminology and standards to develop, write, and present all the product development information that the customer requires.

Idea-to-product process. As Figure 1 shows, this process straddles the hurdle and largely involves project management. In these activities, effective daily written and oral communication is critical to an IT consultant's visibility. These skills will make it easier to manage the process and report individual and team contributions.

Resolving issues

IT consultants should take the initiative to resolve customer issues. Because consultants are outside the customer organization, they are able to see things differently from those inside. The rule of thumb is to actively listen. If customers are having trouble communicating their problems clearly, you can contribute by posing just the right question to clarify the issues. Sometimes customers do not know how to state their problems correctly, because they

do not completely understand technological issues. In these cases, gently educating the customer about the relevant IT will provide a common baseline for discussing the problem and possible solutions.

Recommendations from Ten Step (<http://www.tenstep.com>) are a good basis for managing and resolving customers' issues.

Resolve issues as soon as possible. An issue is an urgent concern that could threaten the project's success. Issues require immediate attention, but an issue often has unknown elements. Try to identify these and address the issue completely. If an issue is difficult to resolve quickly, consider breaking it into manageable pieces.

Recognize what constitutes an issue. This is particularly important when dealing with a large issue or many issues. Is it truly an urgent concern that threatens success unless it not resolved right away, or does it simply require attention at some point? If you encounter a barrage of issues in a short period, consider how they relate. It might be possible to identify a single underlying issue.

Look for the root cause. When you look into an issue, ask why questions until you get to the root cause. With continued probing, you are more likely to get the root cause of an issue, instead of merely treating its symptoms.

Clearly, IT consultants can better meet their objectives with effective communication skills. They can more easily share knowledge and expertise with customer staff members and manage constructive working relationships. Communication skills are vital in keeping management informed of progress and status and respecting the privacy and confidentiality of customer information. Finally, they can meet one of the most important objectives: to help customers by anticipating their needs and helping them resolve issues. ■

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