$ HOW TO GET YOUR MONEY'$ WORTH FROM YOUR CONSULTANT

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How to Get Your Money's Worth from Your Consultant

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To our clients,
past, present and future,
and to our mutual success.

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FROM YOUR CONSULTANT

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FORWARD

Where was this book thirty years ago when I began consulting? Having it in my pocket to share with clients would have taken years off my learning curve and, no doubt, brought more powerful results and less *angst* for my clients.

No two clients or projects are ever the same. However, the ingredients or strong consulting/client partnerships are strikingly similar. The process outlined in "How to Get Your Money's Worth from Your Consultant" is straightforward and extremely helpful. They've covered the basics in very few words, but with great precision. This will be helpful for clients and consultants alike in building a common framework for success.

George, Mary Lou and Glen have caught some of the most important indicators of potential great results--building a partnership, with trust, clear expectations, commitment to results, a way to frequently audit performance, and make any changes to the contract.

Pinpointing results before getting into design and implementation makes or breaks many projects. However, this step is often overlooked resulting in bad feelings and less than optimal results. Getting the picture of desired results so clear that everyone can see it in the same way brings magic, and even simplicity, to many projects. The questions and approaches described here are a "must" for any consultant or leader who is serious about their project.

Chapter 6, *Show Me the Value*, provides a great theme song for a mutual assessment of the consultant/leader interactions and results. Don't just wait until the end of the project to discuss "value-added". Use the questions in the guide to do frequent *reality checks* on your mutual contributions. Find successes and failures early on so you "learn" from experience and self correct.

The writers' precision and passion *for getting your money's worth from consultants* jumps from the pages. Whether you are a consultant or a leader/manager, you will get great value from this easy-to-read guide.

Caela Farren, Ph.D.
President, MasteryWorks
Author, WHO'S RUNNING YOUR CAREER?, 1998

INTRODUCTION

Welcome to our world. We are consultants, internal and external, who really do believe that our work can make a difference and actually help organizations and the individuals in them get better results from their own work. As a matter of fact, it is on those occasions when we see an organization make dramatic improvements that we get satisfaction from our work. It would be great if consultants like us could honestly say that we always see dramatic improvements in the organizations we help. But that's not always the case. Each of us has had assignments in which our success was more elusive, results were harder to quantify, and client feedback regarding their satisfaction level was at best, mixed, and at worst, non existent.

What happened in those tough assignments? We have some ideas on that subject - and that's why we wrote this book. We believe the answer is the combination of two factors: thorough planning done together by the client and the consultant; and an open and trusting relationship. These combine to create successful improvement efforts.

In this book we share with you a process that we are convinced will lead to significantly improved results in any organizational initiative in which you work with a consultant. If you follow this process, there will be no question about the success of your effort and the value the consultant added. The results will be clear.

Our book is called *"How to Get Your Money's Worth from Your Consultant."* However, any discussion about how much money to pay a consultant or how to negotiate fees and payment schedules is noticeably absent. The theme of the book is how to get the highest value from the working relationship with your consultant regardless of the agreed upon fee for service. Our focus is how to maximize the results of any improvement effort you undertake with the assistance of an internal or external consultant.

We do not discuss the negotiating process or the content of a *contract*. Many organizations require a written agreement (*contract*) for certain contractual arrangements to fulfill a legal or policy need. While these documents may be helpful, the focus of this book is on the agreement, written jointly by the client and the consultant, that clearly spells out the work to be done and the expected results. This topic is the subject in chapter 5, *Collaborative Planning for Results*. This working agreement is a prerequisite for the success of a project and is separate from any required *contract*.

To make your reading of the book flow as easily as possible, we usually use “consultant” verses “consultant(s)” or “consultants.” We recognize that in many consulting agreements you work with multiple people from one or more consulting firms. We feel the ideas and guidelines suggested in the book are equally applicable whether you’re working with one or several consultants. We hope you will find the singular form of the term easier to read. It certainly made the writing easier.

We do use a few terms interchangeably and want to alert you to that fact. In describing the nature of the work usually performed with the help of a consultant, we refer to it as a *project*, an *improvement effort*, or an *organizational initiative*. Each phrase is merely intended to be a place holder for whatever term you normally use in your organization to describe those efforts you undertake to make things better.

Our sincere hope is that the message contained here will help you get better results whenever you partner with a consultant.

1

WELCOME TO THE STAFF MEETING

"We've now been involved in this change effort for 18 months," said David, the executive VP, frustrated.

"We knew this was going to be a long-term strategic change effort, probably lasting three years," Jay, the highly paid external consultant, said indignantly.

"Well, why isn't this effort moving faster?" asked Mark, operations director.

"We are right where we thought we would be after the completion of Phase Two," Sharon, the internal consultant, said facilitatively.

"What is Phase Two?" asked Bruce, the sales executive attending his first project update.

David leans forward onto the conference table and asks pointedly, "So why aren't our performance measures improving?"

"We weren't expecting improvement until the completion of Phase Four, the implementation Phase," explained Susan, the project leader, beginning to sweat profusely.

"What is Phase Four?" asked Bruce, looking up from his daily sales report

"Well, if I had known this was going to take this long and affect our performance in this way, I would never have signed up for this change effort and for this expenditure!" barked David.

"The pay back period for your expenditure will, I'm sure, be significantly less than three years ... after implementation, of course," said Jay, also beginning to sweat profusely.

"Who's in charge of this effort, anyway?" demanded David.

At this point, Jay, the external consultant, pointed to Sharon, the internal consultant, who pointed to Susan, the project leader, who pointed to Bruce who promptly stood up and excused himself saying, "Sorry, I have to run to an important strategic planning meeting."

Does this sound vaguely familiar? All too often, we have seen the aftermath of consulting efforts in which the clients are dissatisfied with the results and the consultant is complaining that the client was unclear about what she expected until after the work was done. And the results are not what was expected, or paid for ... at least they are not what the client thought she paid for!

We assume at this point that you have assessed the situation and determined that working with a consultant could add value to your improvement effort. If so, wouldn't you like to get the most impact and best results for your consulting dollars? When you reach for a consultant you have the opportunity to create a situation in which the "*rubber* of partnering" meets the "*road* of results."

Today, however, there is considerable skepticism about the value of consulting. Just turn to any of the books by the famous management guru, Scott Adams. We are certain you can identify with the escapades of Dilbert and his consulting colleagues, Dogbert and Ratbert. The primary causes of disappointing results in improvement efforts, launched with the help of a consultant, are (1) a poor partnering relationship between client and consultant and (2) a serious lack of planning.

In this book we present a straight-forward process to help you establish the ideal relationship with any consultant. Following the guidelines suggested in this book will result in a powerful working relationship with your consultant and will greatly increase your chances of success in whatever effort you undertake.

We begin our discussion with some considerations regarding the selection of your consultant.

Who is the client?

Who is the consultant?

The answer to this question seems obvious.

But our experience teaches us

that it's not always the case.

2

SELECTING A CONSULTANT

The first challenge you face, with so many consultants to pick from, is how to decide with whom to partner. Whether you're hiring an organizational / business consultant to assist with a major change effort or a consultant with a specialized skill such as unique programming ability, the need for careful selection is a *critical* success factor.

A personal endorsement, preferably from a person you know and whose opinion you value, is the most helpful information you can seek. Ask about several key aspects of the consultant's behavior and approach. Here are some questions to stimulate the conversation during the discussion:

- What practices and methods did the consultant use?
- How thoroughly did the consultant develop an understanding of your business and the critical measures of its success?
- How did the consultant establish and document clear expectations before beginning the actual work?
- How did the consultant propose to measure the success of the project?
- In what ways did the consultant incorporate input from people in the organization when determining the appropriate plan of action?
- How did the consultant develop an understanding of the design and scope of the project?
- Did the consultant have a *results* focus or an *activity* focus?
- Describe the consultant's work style and approach to people.
- How did the project turn out?
- Were the results those that were expected?

These questions will help you determine the consultant's flexibility, his or her *results orientation*, and most importantly, whether the consultant's style and approach are compatible with your organization's culture.

Once you have selected your consultant you need to answer two questions: Who is the client? Who is the consultant? The answer to these questions seems obvious. But our experience teaches us that it's not always the case.

The *real* client is the person who makes key decisions about the planning and execution of the project. It is not necessarily the person who plays a lead role in the execution of the tasks related to the project. While this role is important to the success of the effort, we are talking about the ultimate decision maker who will be sitting on the hot seat when critical decisions need to be made.

The *real* consultant is the expert who will be making the recommendations and calling the shots from the consulting perspective. When dealing with larger consulting firms you may find yourself initially talking with a competent member of the firm but one whose job is to accurately represent the firm's capabilities and "get the order." He or she may not be the same person who appears on your doorstep when the work begins in earnest. Larger firms may have multiple specialists who each handle different aspects of the project. While not a problem, this is a situation in which you need to be clear about who in the consulting firm plays what role. (In a very small or one person consulting organization, this is generally not an issue.)

A follow up question to the issues of, "Who's the client? Who's the consultant?" is: "So what's the big deal?"

The importance of this issue is that before you select a consultant you must meet all the players, understand their roles, and determine if they truly meet your requirements. You want to avoid the situation in which you deal with a polished and experienced senior consultant but your people work with less experienced and less knowledgeable consultants. You should not be paying for the education and training of inexperienced consultants.

Another aspect of this issue is just as important. You may not be alone in making some of the key decisions throughout the life of the project. Highly technical areas, or the involvement of multiple facilities, often necessitate that several people participate in key decisions relating to the project during its life. Involve these key players in your organization in the selection of the consultant.

All these “getting to know each other” preliminaries are important because *undoing* the selection decision is difficult. Once the project is underway the working relationship with your consultant can be ended, but this action creates a lot of problems. Are you going to scrap all the work done so far and start over? What about the delay in the time table? Are you going to select another consultant? What about the impact on your credibility within the organization? All these issues distract from solving the original problem or achieving the results you wanted in the first place.

The good news is that careful selection of a consultant makes it highly unlikely that you will face this time-consuming and potentially expensive snag.

When selecting a consultant is done for you…

Sometimes the task of selecting a consultant is done for you by the corporate office or another organizational entity. In this case, your task is to establish an effective working relationship with your new partner. Schedule a time to talk with the consultant to build the foundation for a trusting relationship. Make the most of the opportunity to learn new perspectives and methods from the consultant. This approach will help you develop a strong relationship and achieve the desired results.

As important as it is, a trusting relationship between you and your consultant is not enough to successfully implement a major improvement effort in your organization. The following section discusses a methodology designed to ensure the success of your project.

CPR ... can bring to life
an otherwise dead project.

Unless the desired results
are clearly specified
in measurable terms,
someone is going to be disappointed.

3

COLLABORATIVE PLANNING FOR RESULTS

What can you do to avoid finding yourself in a staff meeting like the one described in the opening scenario? (Remember that scenario - progress recorded at glacial speed, multiple performance expectations, frustrated executives and, of course, the search for someone to blame.) Begin by investing in as much “up-front” time as you can with the consultant to partner in creating a “CPR.” Collaborative Planning for Results - or CPR - is the term we apply to the process of establishing a successful partnership between you and your consultant. It is a radical departure from the practice of sending the consultant off to *write a proposal* that will solve your problems. Too often proposal writing becomes an exercise in frustration (or even surprise!) because the proposal can only represent the consultant’s best guess regarding the situation that you and your organization are struggling through.

In some ways, the phrase “Collaborative Planning for Results” can act just like the other CPR (Cardio Pulmonary Resuscitation). It can bring to life an otherwise dead project. Look for a moment at the three main points of this phrase.

First, “Collaborative” describes the ideal process by which you and your consultant will come to agreement on the key elements of this document. Second, “Planning,” as the term implies, means that agreement on all the important aspects of the work will be ironed out before the work actually begins and, as is the case with all good plans, it will be written down. Third, the “Results” piece of the phrase is usually the hard part. This is where you articulate the specific results you want from the effort you are undertaking.

Collaborative Planning for Results is ideally developed jointly by you and your consultant. It defines the key aspects of the work and states the desired results.

The five (5) elements of the CPR are the:

1. Purpose
2. Measurable Results
3. Principles & Givens
4. Roles & Responsibilities
5. Scope

1. PURPOSE

The Purpose is an explanation of why you and your organization are willing to dedicate resources, spend money, and take on this effort. Establishing the Purpose does two important things. As reflected in our hypothetical opening dialogue, there are often more people than just you making decisions in the client organization. Establishing a Purpose gets all the key members of the client team on the same page. This sounds so intuitively obvious to even the most casual observer and yet... oh well. You've probably seen the chaos resulting from the absence of an agreed upon Purpose more times than you would care to admit.

Secondly, the process of developing the Purpose is a dialogue with your consultant that ultimately enables him or her to understand what you really want from the project. Partnering with the consultant in creating the Purpose means allowing the consultant to ask you and some of your key people questions that will surface the real issues. It means keeping focused on the results you expect and reaching agreement with others in your organization. It means indulging in "what-ifs," "if we could just," or "suppose we could," to probe all facets of the issue. This is step one in creating a truly collaborative effort.

2. MEASURABLE RESULTS

How will you, your organization, and the consultant know if the project is successful? We all know the answer to this is to establish measures up front. But what kind of measures? Hopefully, the results you're after are directly aligned with the key measures of your business performance. The Measurable Results are the quantifiable results that are expected and necessary for the initiative to be successful. The measures may be quantitative or qualitative -- but they must be clearly defined.

Improving order lead time, increasing inventory turns, and improving customer service are all worthwhile goals. But don’t fall into the trap of measuring activities rather than results.

For a customer service goal, some activities are the number of customer visits or meetings, the number of personal sales calls, or how many special product promotions were launched this month

Results look more like this: 50% reduction in the number of returned orders each month by March, on-time delivery performance at 99% by year end, or a 75% reduction in the number of customer complaints in the next quarter.

Unless the desired results are clearly specified in measurable terms, someone is going to be disappointed. Precise measures are the indicators of your progress and ultimately your success. They will be used to measure how you are doing and to provide data for any course corrections that may be needed during the project. A vigorous commitment to the time and energy necessary to nail down the Measurable Results does a great deal to make the Purpose come alive and bring it into focus. It is a critical step in getting the most value from your consultant.

3. PRINCIPLES & GIVENS

Even though they are different items, we discuss Principles and Givens together because they have a similar impact on the work that you do. They strongly influence how work ultimately gets done and sometimes dictate certain actions.

Most organizations have a set of Principles. Principles are established values and beliefs that guide employees’ judgments and decisions. Whether these guiding Principles are written down or simply understood and followed by everyone, they are important in any major change effort. Therefore, you should make sure the consultant is aware of them at the outset of the project. For example, if the project you are undertaking is going to create new job opportunities and your organization has a long-standing principle of promotion from within, follow your principle. However, if it is absolutely necessary for the success of this effort that you hire people from outside your organization, clearly explain to everyone the reasons that have necessitated the change in the organization's Principle of promotion from within.

Givens are the conditions affecting the project or the expected results that are, out of necessity, established by someone other than you or the consultant. For example, the corporate office may have established minimums for a return on all capital expenditures; costs of installing the new system must not exceed $450K; the new product must be commercialized by September.

Any such Givens must be identified and communicated to everyone, including the consultant, at the outset of the work. The consultant must understand the Principles with which the organization operates and all Givens imposed on the project. It is your responsibility to see they are communicated.

4. ROLES & RESPONSIBILITIES

Many variables determine the best way to lead and manage a specific project. Some are: the objectives of the project, the abilities of the people in key roles, the culture of the organization, the timetable, and the resources available. One of the most important variables is the project management structure you establish to provide overall direction to the project. Whatever structure you and your consulting partner put in place, document it and communicate it. Let everyone know his or her responsibility and level of authority.

Ideally, everyone involved in the effort has a written description of responsibilities and levels of authority.

The level of detail of this description obviously depends on the level of complexity of the project, but clarity in this area is important. Investing time to establish this accountability at the outset of the work enables people involved to know what is expected of them. This helps people know whom they can contact for answers and who can make certain decisions.

5. SCOPE

The Scope of a project describes the breadth of the work. It is a statement explaining which departments, functions, or business process will be directly affected by the project. And by contrast, which ones are not expected to be impacted by the project. For example, if you need to upgrade your manufacturing computer systems, will this affect scheduling as well? Will shipping and receiving in-formation flow be impacted? Will the inventory manage-ment and financial reporting systems be affected? Will this mean a reworking of the order entry system?

The answers to these questions will have tremendous impact on the costs and length of time for the project and, of course, the resources required.

Clearly stating what department, function, or business process is off limits or out of bounds is necessary for any major effort to stay on track. What happens if Scope isn't clearly defined? That insidious disease we call "Scope Creep" sneaks into your work. This disease is like a virus that takes over otherwise healthy cells and eventually disrupts the entire metabolic process. Scope Creep will infect your project and provide ready-made excuses for cost overruns, time delays, confusion, and frustration.

However, in the course of most major organizational efforts, *things change*. But the Scope of a project should only be changed with proper consideration and approval. And yes, the change should be in writing. This means going back to the original Collaborative Planning for Results document and making all the appropriate changes including any new measurable results. While this creates the need to re-communicate any substantial changes in the original CPR to everyone affected, it will avoid confusion later.

The five components of the Collaborative Planning for Results process -- the Purpose, Measurable Results, Principles and Givens, Roles and Responsibilities, and Scope -- are all of equal importance in getting the results you need. The components are interlocked and work together to establish a total view of the improvement effort. They create a plan or charter that drives the project to a successful conclusion. The CPR, done thoroughly, provides direction to all the people involved in doing the work and information to those in the organization who are only observers but have a vested interest in the outcome of the project. CPR is a life saver for your important improvement projects.

In discussion of each of the elements of the CPR, we speak directly or indirectly about communications. Obviously, effective communication plays a crucial role in the success of any improvement effort. We devote the next section to some key points and considerations about communicating.

You cannot not communicate.

One of the hardest task for any leader
is to convince associates
that the new expected results are real
and that there are consequences
if they are not achieved.

4

COMMUNICATING

You cannot *not communicate*. If you do not speak any words, your body language communicates. If you are not present, your absence communicates. So you do not have a choice of whether or not to communicate. Survey after survey concludes that poor communication is a significant barrier to improving organizational performance. Communicating effectively is challenging in one-to-one relationships. It takes time, energy, and commitment to learn to communicate with our family, friends, and colleagues. It is even more challenging in large organizations when you are communicating with people you may not know personally.

The most important communication you will do during the consulting initiative is to share what must be achieved. One of the hardest task for any leader is to convince associates that the new expected results are real and that there will be consequences if they are not achieved. Neither your consultant nor your staff can convey this message. Only you, the senior leader who is responsible for the ultimate success of the work, can deliver this message effectively.

Beyond these *new expected results*, what else should you communicate during the initiative?

- Why is this effort important? Communicate the logic and rationale for this effort. Include customer, competitive, and other relevant marketplace information.
- What is going to happen?
- How will this effort affect individuals?
- How will individuals and your organization benefit from successful completion of the project?
- Share the CPR with the organization.
- Provide updates on key measures and project results.
- Recognize individual contributors and the team as they succeed.

Face-to-face dialogue is the best method for delivering the expectations and the rationale for the consulting effort. Use videos, e-mail, voice-mail, and newsletters to supplement and reinforce the message but not to take the place of face-to-face dialogue. The time you spend communicating with people demonstrates your commitment to the goal, builds understanding of the reasons behind the effort, and surfaces resistance. In addition, it shows you care about the people affected, one of the most important elements for gaining their trust and commitment.

This chapter on communicating is the shortest one in the book. By no means does this imply that communicating is not important. It does say that with proper planning and thought regarding what and how you want to communicate, you can accomplish communications efficiently.

You have selected a consultant, developed a plan, and communicated expectations. Now it’s time to do the work.

Who owns responsibility for success?

Design is one thing,

Implementation is ***EVERYTHING!***

5

DOING THE WORK

Once you have completed the CPR, it is time to do the work. Getting the most out of your consultant requires that an activity plan be developed and maintained. At a minimum, the activity plan should include: project steps or milestones, responsibilities (consistent with the CPR), and target completion dates. This basic project plan allows you to effectively manage the work.

Few organizations would think of building a new building or installing new manufacturing equipment without a thorough activity plan with key steps, clear responsibilities, and target completion dates. They conduct regular project reviews from start to finish to ensure the project remains on schedule and in budget. Our experience is that many organizations allow consulting projects to start and go on and on with little planning and / or management review.

Project reviews are critical for several important reasons in consulting projects. First, they allow you and other key leaders to stay in touch with the work as it progresses. Effective project reviews allow you and other key leaders to provide input into the data and recommendations, thereby minimizing the risk of surprise when the final recommendations are complete. Second, project reviews allow you to recognize the team and individuals for accomplishments. Third, project reviews provide opportunity to make modifications to project schedules and resources. Fourth, project reviews allow you and other leaders to recognize individuals and the team for completed work. Finally, progress reviews allow you to assess information and adjust the project scope preventing an outbreak of Scope Creep.

Another consideration for doing the work is “Who owns responsibility for success?” After the proposal is accepted and a contract is signed, the consultants dive into their consulting model, often with little participation from the client organization. This results in poor acceptance and ownership for the recommendation. An effective way to overcome this issue is to partner with the consultants by assigning an internal project leader and team members to work alongside the consultant team.

This partnering has several benefits for your organization. They are:

- facilitating ownership of the recommendations
- decreasing resistance to implementing solutions
- saving cost by having your employees perform project logistics
- developing organizational capability
- developing future business leaders

All consulting projects, no matter what consulting model used, reach a point when you make a decision to begin implementation. Often this is after considerable time and a great deal of work by you, the consultant, and individuals in your organization. Development of the solution represents a major accomplishment and there is sometimes a tendency to relax or let up the intensity of effort. During implementation, you must overcome this tendency in order to achieve the bottom-line results identified in your CPR. Think of it like this:

Design is one thing,
Implementation is **EVERYTHING!**

Implementation is about making change. Robert Schaffer, a management consultant and author of High Impact Consulting, says that "The ability to make things happen, to effect change, is the most critical dimension of organizational success."

Implementing the consultant's solution or design usually takes more time and effort than creating it. Select your consultant, develop the CPR, then do the work remembering that implementation is everything. Do not stop until you have the results you want.

In the next chapter we look specifically at assessing the value of the consultant's work. As a corollary to the currently popular and often repeated line from the movie *Jerry Maguire*, "Show me the money," we say, "Show Me the Value."

When you combine true resolve

to achieve the results

with the energy invested

in planning and doing the work,

the collaboraation between you and the consultant

creates real value

by delivering the expected results.

6

SHOW ME THE VALUE

When you are a using consultant to improve organizational results it makes little sense to let him or her leave before you have the results you were expecting. Your consultant should see the project through to the end. So when should the consultant leave? The easy answer is: at the end of the project. How do you define "the end?" It's that point at which results match or exceed what you specified in the Collaborative Planning for Results.

In the CPR process you identified and developed Measurable Results for the work. However, remember that "Design is one thing; Implementation is everything." During implementation your consultant plays an important role in refining the solution, overcoming implementation challenges, and helping you complete the work. You have done the planning and invested the energy to do the work. At this point, a new element becomes critical: the true resolve to achieve the results.

When you combine *true resolve to achieve the results* with the *energy invested in planning and doing the work*, the collaboration between you and your consultant creates real value by delivering the expected results.

Another way to identify the consultant's value is to conduct a thorough evaluation of the project. Audit the work just as you would audit a major capital project. Here are a few questions to start the audit process.

- Was the work completed on time?
- Was the work within / under budget?
- Did you achieve the results as originally defined?
- Did you follow the Principles and Givens?
- Were people clear at all times about their responsibility and authority?
- What did you learn about your organization that can help improve results in other areas?

- What did you learn about managing a large project that you should share with future project leaders?
- What did you learn about implementing change that can help in the future?

With the project audit completed there will be no question as to what value the consultant added.

Auditing the project also provides the benefit of giving and receiving feedback between you and your consultant. Consultants need feedback on how they work in order to improve their style and consulting process. And, in turn, consultants can provide objective feedback that you and other leaders in your organization need in order to be successful in the future. Too often, you as a leader receive only the feedback that your subordinates feel you would like to hear. Two-way feedback helps everyone.

Finally, consider writing a case study. Many publications are looking for actual experiences to share with their readers. This can be a source of free publicity for you, for your organization, and for the consultant.

Following the steps in this book ...
will guide you to a powerful working relationship
with your consultant
and will greatly increase the chances of your success
in whatever effort you are undertaking.

7

IN SUMMARY

Today we still find leaders who believe that despite the organizational mess they may have on their hands, their work is over when a consultant is hired. They feel the consultant will do all the work, has all the answers, and is being paid to share those answers with the organization. But in reality, the work really just *begins* at the outset of a consulting assignment.

This seems obvious. So why is thorough planning with a consultant frequently overlooked? There are a number of reasons. Everyone is busy; we don't have the resources; it's annual planning time. And the list goes on. Another reason that comes into play is that many clients and consultants don't have a comprehensive format to guide the planning process.

Our purpose in presenting this message was to provide a methodology to help you and your consultant collaboratively map out a successful game plan for your organizational improvement effort and to establish an effective partnership with your consultant. Following the steps in this book regarding:

- selecting the consultant
- collaborative planning
- communicating
- doing the work
- determining the value

will guide you to a powerful working relationship with your consultant and will greatly increase the chances of your success in whatever effort you are undertaking.

Maybe your next staff meeting to review a key project will go more like the following one rather than like the opening scenario...

WELCOME TO THE STAFF MEETING

"We've now been involved in this improvement effort for 18 months," said David, the executive VP, enthusiastically.

"Yes, and we're right on schedule," said Jay, the external consultant proudly.

Mark, operations director, looking up from the latest budget report said, "And we're still within budget!"

"We will begin implementing the changes at our other facilities next month since our pilot went so well at this facility," said Sharon, the internal consultant.

David leans forward onto the conference table and asks, "How are the most recent performance figures?"

"We have hit every performance target we set at the outset of the project," said Susan, the project leader, confidently.

"Especially the performance targets related to our top line sales," chimed in Bruce, the director of sales.

"I'm glad to hear all our efforts are paying off. We'll be breaking even on our investment sooner that we projected," said David. "I can clearly see the results of all your hard work. My compliments to each and every one of you!"

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