

## Ten Steps to a More Effective Consulting Experience

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At some point in your career, you may need to call upon some outside expertise. Whether you lack domain knowledge within your organization, have limited experience with a particular technology or system, or quite simply don't have the bandwidth or resources to get things done, there may be times when an outsider could help. What can you do to make the most of it?

Having sat on both sides of the table as a customer and as a consultant during my career, one lesson has consistently emerged:

***The value of a consulting relationship is in direct proportion to the customer's commitment to and participation in the engagement.***

Wait; didn't we start by saying that a significant reason for hiring consultants is a lack of time or experience in house? The latter notwithstanding, the biggest mistake that can be made in these situations is to turn the project over to a consulting group and expect them to deliver perfect solutions without your insight and support. *Abdication* doesn't work! An understanding of your role as the client and execution of those tasks that simply cannot be off-loaded to a consultant will define the success or failure of the engagement. Here, then, are:

### ***The Ten Things You MUST Do To Make the Most of Your Next Consulting Engagement***

- 1. Clarify and Agree on Objectives Before Project Begins** – Clearly communicate project objectives and the level of detail that you expect to see during the analysis and in the final presentation and report. Do not sign a contract without mutual agreement to these points.
- 2. Define Assumptions** – Remember, assumptions work both ways. Clearly define what information and resources YOU will bring to the project as well as what you expect from your consultant with respect to resources, project timing, deliverables, tools, etc. A solid consultant can help with definition of these responsibilities. Clarify them before the consultant is engaged.
- 3. Allocate Sufficient Resources** - Ask the consultant to prepare a *data template* prior to the start of the project that identifies the background data required for operations analysis. Armed with this information, you can plan the staffing and effort needed to collect and compile the necessary data. Don't expect the consultant to perform work in a vacuum without input from your organization.
- 4. Communicate Within Your Organization** – Prepare your own organization in advance by asking for input on scope, level of detail, and data sources. For example, could inventory accuracy issues be

related to a returns backlog or inbound receipt staging? Are these areas going to be considered as part of the engagement? If not, do we need to expand project scope or make sure that additional people are involved to share specific information? Pre-engagement communication with your organization can prevent backtracking, sniping, and scope changes once the project has begun – and should help to keep the project on –schedule and within budget.

5. ***Make the Kick-Off Meeting Effective*** – Senior management should kick off the engagement and frame the consulting initiative within the context of short- and long-term company goals. Project objectives as well as the timeline for deliverables should clearly defined. The goal here is to establish a sense of urgency and a broad understanding of the importance of getting the job done right.
6. ***Conduct Weekly Updates*** – Regularly schedule updates with the consultant during the life of the project. Updates should cover unresolved issues, period accomplishments, next period objectives, etc. Also, ask for regular reports on effort expended-to-date and projected effort-to-complete. You don't want to discover that the consultant has been waiting for key data to validate a critical observation two weeks after the fact!
7. ***Schedule A Midpoint Review Session*** - Review what's been compiled-to-date and ensure that the observations and supporting data are consistent with expectations and your own perspective – and, that they are able to pass a “common sense” test. Make sure that recommendations are not being built upon incomplete data or operational anomalies and that they have not been unduly influenced by the bias(es) of a particular corporate segment.
8. ***Float Preliminary Conclusions*** – Share tentative observations, conclusions, and possible recommendations with executives and staff alike. Do the concerns and issues you and the consultant discover elicit the same reactions from others who review the project work? Does the information suggest alternatives that have not been considered? Again, ensure that the level of detail in the analysis is sufficient to support the conclusions planned for the final presentation.
9. ***Allow Sufficient Time for Development and Review of the Final Presentation*** – Double check the completeness and accuracy of all information. Nothing will kill a final presentation quicker than recommendations based upon flawed data – and, believe me, someone will spot it.
10. ***Conduct the Final Presentation as an Integrated Team*** – Consultant recommendations are only as good as the quality of the data presented and the support demonstrated by participating staff. Every person on the project team should present a portion of the

findings. Use your team to validate points with detailed, company-specific examples in order to provide a substantive view of what needs to be accomplished. Don't leave it to the consultant to explain how YOU are going to incorporate the findings into an executable plan.

To recap, a successful consulting engagement is characterized by:

- A well-defined scope with clearly articulated objectives;
- Reasonable assumptions;
- Up-to-date, complete, and accurate data;
- A logical methodology, consistently applied across all processes
- Recommendations that are clearly in line with long-term company goals
- Work product validation by client team members.

The job of the consultant is to identify performance improvement opportunities and alternative solutions – and, in many cases, a roadmap for moving forward – based upon data provided by and interaction with the client organization. The client's responsibility is to provide the perspective, data, resources and oversight the consultant needs to develop a solution that can be cost-effectively implemented. To ignore this key ingredient of the engagement recipe almost invariably hampers the consultant and leads to a less than satisfactory conclusion.

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