

A trusted advisor

the adventures of a project management consultant

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Abstract

Some individuals are excellent project managers, while others are excellent consultants. Being able to be both requires separate, but not necessarily mutually exclusive, skill sets. This paper will demonstrate the critical skills, interpersonal actions, methods, and tools required to effectively engage and sustain a trusted advisor relationship with the project management stakeholders. This paper will describe the common Project Management pitfalls that lead to stakeholder dissatisfaction when a professional is perceived as just an “extra pair of hands” or a “subject matter expert”, as opposed to a business trusted advisor. It will also describe the proven approaches to achieving a stakeholder relationship built on strong communications, mutual collaboration, business acumen, and trust.

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Introduction

“The glue that holds all relationships together - including the relationship between the leader and the led is trust, and trust is based on integrity.” (Tracy, 2006).

On a recent trip to New York, I was amazed at the cab driver as he pushed across a three lane busy intersection that we had been waiting at for over five minutes. I mentioned to my wife, “Only a New York cabbie could do that,” as we moved across the intersection. Our cabbie laughed and said, “Let me tell you, I have been a cab driver for 15 years. We cabbies have a saying over here. We use the road and everyone else just drives on the road.”

By bending the rules, taking calculated risks, and using his experience of the many roads, lanes and shortcuts of New York, he made our journey faster, more efficient, and safer by using the road rather than just driving on the road. Later I thought about the difference between “using the road” and “driving on the road” and the difference between project managing and project management consulting. For companies facing too many projects, projects that seem a chance every day, not enough good people, and not enough time and money, project management consulting is about using the road.

Effective Engagement

Start of an Engagement

Getting the consulting role

When you were being interviewed for your last job you possibly were uncomfortable with selling yourself. Many consultants do not feel they need to do the selling. They believe the work speaks for itself or the stakeholder clearly understands the need. Especially since the Global Financial Crises, this is not always the case.

There is a mindset that focuses on going in for the “hard” sell (Verzuh, 2008). There is never a guarantee that, when focused on trying to sell project management consulting skills, the consultant can pitch it in a way that will convince the stakeholder to buy. This is a major issue with sales in project management consulting. Having a focus on getting hired can change the results dramatically. Next time you are in an interview try to think about how to convince this person to put their trust in you. This will provide you with a clear scope going forward.

The sales process should be a structured act (Stroh, 2006). While there are many techniques and methods of selling, most consulting firms will have a standard project management consulting presentation. Each is professionally effective and has been successfully evolved over many years, creating many sales. However, there is another option that I have found that works. Start working on the project.

In any case, there is a level of risk when engaging a project management consultant. As in Project Risk Management, the objectives are to increase the probability and impact of positive events, and decrease the probability and impact of negative events (PMBOK, 2008, pg 273). Some of the stakeholder risks identified in hiring a

project management consultant are financial risk, schedule slippage, embarrassment of making the wrong decision to hire a consultant, and career risk, to name a few. After completing a qualitative and quantitative risk analysis, the risk response that could reduce all those risks by demonstrating how it would be to work with the consultant would be advantageous. This is one of the reasons why stakeholders keep coming back to the same consulting firms.

The old consulting firm expression “don't give away our secrets until the stakeholder has paid” loses both new work and building trust with a stakeholder. You will have heard project management consultants, during a sales pitch, talk about how good it will be when they start working for you, rather than actually starting the consulting. No stakeholder wants to buy a car without driving it. While you may be a senior project manager, if you also want to be a consultant you must sell confidence, security and ease.

Connecting with new stakeholders

Before you start any engagement with a new stakeholder the one most important item, which is the foundation of the role, is to know your stakeholder. Being aware of stakeholders and their issues should be considered as the first step in the development of trust. In Brooks and Travesano's *You're Working Too Hard to Make the Sale* (1995) they suggest that you need to indicate promptly that you understand the stakeholder's wants. Not needs, wants. Not to deliver, just understand.

Connecting with new stakeholder wants should quickly extend to understanding the wants of all the stakeholders of the project. Use of Plan Communications (PMBOK, 2008, pp 251 - 257) can assist you with this. Understanding the Plan Communications process responds to the needs of the stakeholders not the wants. The difference as a project management consulting, you would want to focus firstly on the stakeholder wants before moving onto their needs to gain their trust.

Each Stakeholder is different

Having understood the stakeholder's wants, you need to figure out how to tailor your approach to deal with each person as they would like to be treated. If you can focus on understanding the stakeholder's primary personal motivation then you have a chance of tailoring your conversations for success.

Good acting is not lying. Angelina Jolie is famous for saying “acting is not pretending or lying. It's finding a side of yourself that's the character and ignoring your other sides.” Don't fake it or lie.

Most projects have many stakeholders. To keep track of all their motivations a good tool is the classification model with stakeholders explained in the Project Communications Management (PMBOK, 2008, p 255). Exhibit 1 below shows four different columns showing different motivations. When filling the table out, think about the stakeholders prevailing personal motivation and which of the four comes first.

Stakeholder	Needs to excel & see quality results	Needs to take action & see results	Needs to understand & analyse before deciding	Needs for consensus

Exhibit 1: Consulting Communications Table

During an Engagement

Stepping stones of trust

Even the most professional and senior PM consultant can feel overwhelmed at the start of an engagement. It is rare to be hired at the right moment in a project's lifecycle. Firstly, there is a need to grasp the current phase of the project to determine what needs to be done to get some quick wins on the table. Trust is built on respect. Respect can grow from seeing some improvements or progress. You must make something happen quickly to build that trust. Secondly, find out everything you can about the project. Any project manager who doesn't read all the project documentation, previous projects lessons learnt and an extensive internet search of the product is setting up for failure (Kerzner, 2009).

Dale Carnegie in his book *How to Win Friends and Influence People* states "You'll have more fun and success when you stop trying to get what you want and start helping other people get what they want." As a project management consultant this can be harder than it sounds. During a project risk meeting, you can find yourself thinking along the lines of "How will I solve this problem" "How can I appear expert?" We're not thinking about our stakeholder. We're thinking about our reactions to them. We're thinking about our preservation.

Here is the crucial difference between the Project Manager and the Project Management Consultant, from content expert to advisor. As project managers, our task is to identify requirements, address expectations of stakeholders, and balance the competing project constraints (PMBOK, 2008, pg 6). All of these are basically tasks performed out of the stakeholders' presence.

In contrast, our task as consultants is an "in-person" and "in-contact" challenge to help the stakeholder see things anew or to make a decision. This requires a complete change of skills and mindset.

We can not just engage our project management skills and go away with the project team, complete the project work and come back with a great product. Instead, we must take the stakeholder on the journey. Continue to ask them questions to show we are working on it and their feedback is visibly integrated into the product. This shows we are listening to them.

Some key tips to think about when you are listening:

Take it all seriously and eliminate the saying, “Don't worry about that”

Keep asking for more detail until you have a good understanding.

Ask them what they think you can do to help instead of assuming what they need you to do.

Don't finish their sentences even if they pause trying to find the right words.

Summarise what you have understood and what needs to be done.

Your success, and the success of the project, will depend on your ability to listen to what is being said, as well as what is not being said, by all stakeholders (Davidson, 2002). Listening depends on hearing and leads to understanding. What someone doesn't say, or avoids saying, often is more important than what is said. To be a fully effective listener, you must be both physically and intellectually engaged in the process. As a project management consultant you must be perceived to be listening effectively to be able to be engaged in the stakeholder's concerns about the project.

Agendas can be a powerful symbol for working together (Flannes, 2005). Setting the agenda is a very simple project management tool about how the meeting should be conducted and what should be discussed. What we want to avoid is the feeling that the agenda is owned by someone. We can do this by having a quick discussion at the start of every meeting about the agenda. Asking, “What is the goal of this meeting?” creates a message that the meeting is for the mutual benefit of the members involved.

The stakeholder must be always kept in the loop with progress. There should be no surprises. This means that in any meeting the stakeholder should be informed of any

findings before hand. One of the quickest ways to lose the trust of a stakeholder is to go into a meeting with the stakeholder's peers or upper management and you use drama or try to surprise the stakeholder with findings.

Becoming a Trusted Advisor

There are a number of values that underpin project management consultants. These values result in project management behaviours that are:

Open: Everything about the project is shared openly with all stakeholders.

Proactive: Project management is a creative and proactive problem-solving process.

Participative: The management of projects is based on meaningful participation of stakeholders.

Outward focused: The focus of the project management consultant is outward towards the stakeholders.

Trusting: The project team is treated as professionals who are to be trusted.

Very few project management consultants become known by their stakeholders as “great” purely as a result of their abilities to deliver a project. The opposite of the word “consultant” is not “employee”—the opposite of consultant is “technician.” Consulting is predominantly an attitude, not a set of competencies.

Consulting success requires more than talent. Among other things, it requires initiative, drive, involvement, commitment, and, above all, enthusiasm. Determining successful and happy consultants, it is apparent that it has nothing to do with intelligence, what school they went to, or how long they have been consulting. Those who succeed are those who can sustain the magic and excitement they felt when they were first setting out to build a career and were willing to work to make it happen. All it takes to find the fun is a little energy, excitement, ambition, drive, enthusiasm—and passion!

Signs of Failure

Lack of Stakeholder Focus

There is a danger that some project management consultants view their stakeholders as THEM. This can degenerate into viewing the stakeholder as the enemy. All too often, consultants will act pompous, patronizing, condescending, or arrogant, and the stakeholders react by being defensive and more guarded. As Charles Green points out in *Trust-Based Selling* (2005), you can tell a professional provider is treating the stakeholder as the enemy when he or she prefers to work back at the office rather than at the stakeholder's location. Each side, jealous and insecure about its control of THEM, competes for control of the agenda or outcome of a meeting or phone call.

Both sides fight to be right and to prevail, rather than collaborate on finding a solution. This all ends up being against the best interests of all parties concerned. By treating consultants with suspicion, stakeholders create an atmosphere that makes providers more reluctant to show a sincere interest in any stakeholder need or requirement beyond the terms of the contract. In turn, this unresponsive behaviour reinforces the stakeholder's perception that the consultant is not worthy of trust and must be kept at arm's length, watched like a hawk in case they take advantage of the stakeholder.

Lack of Self-Confidence

If you have an active social circle and people like being with you in your personal life, the odds are that you will have a significant advantage in learning the skills and habits of business development. If, on the other hand, you're a social recluse personally, you will find it more difficult to get stakeholders to see you as the trusted advisor they wish to work with.

Project stakeholders are continuously raising concerns that the project manager needs to address. If you jump straight into the answer it shows a level of insecurity that erodes trust. Stakeholders want to be understood and involved in the discovery of the answer. It takes self-confidence to listen and work through brainstorming and know that there will be enough time and skill to get to the answer that is needed (Haynes, 2002).

There lies the real difference between the average consultant and the super-achiever in Jim Collins' *Good to Great* (Harper Business, 2001). He revealed that successful companies, firms and individuals don't preach standards that are different from those preached by others; they just live those standards. And the reason they do is not found in clever business systems but in the strength of the convictions of the individual project managers who run those projects.

Don't Solve their Problems

It's a misleading belief that the advisor's job is to solve problems rather than to help the stakeholder solve problems. A project manager expert's job is to be right. They solve the stakeholder's problems using their technical and professional skill. In order to do this, the expert takes responsibility away from the stakeholder and acts "in charge" until the project is done.

The project manager consultant behaves differently. Their job is to be helpful, providing guidance, input, and counselling to the stakeholder's own thought and decision-making processes. The stakeholder retains control and responsibility at all times. It is easy to see why project management consultants, while they may like the idea being their stakeholder's advisor, actually do not want to be one. They do not want to advise; they want to take charge.

The risk manager does not want merely to recommend mitigation strategies to the stakeholder; they want to control the direction taken. The procurement manager, similarly, does not want to provide input on the purchasing strategy. They want the

stakeholder to hand over authority to them to work out the best vendor as they see fit.

That said, there is nothing wrong with either role. There are many times when the stakeholder is best served by selecting the true PM expert and putting the entire project in their hands. On other occasions, the stakeholder may truly want and need an advisor.

Signs of Success

Win their Trust

The key point is that trust must be earned and deserved. You must do something for the other person to give them the evidence on which they can base their decision to choose to trust you. You must be willing to give in order to get.

A perfect example was when I had to find a real estate agent to sell our home. The first few agents I talked to tried to win my business by telling me about how great their agency and the market was, how many sales they had closed last month and how much was their commission. This didn't create much confidence. Finally I called an agent who, during my initial phone call, asked my level of knowledge in selling real estate.

My reply was, "Nothing!" She then suggested that she would email to me a comprehensive outline of the steps involved: what I needed to do immediately and what I should forget about for a while because it was not urgent. The email also provided links to the websites of all the relevant governmental bodies for further information, even though this had nothing to do with her real estate work.

All of this great information was provided freely, before I had retained her services. Of course, she got my business. She had earned my trust by being generous with her knowledge.

Trust can be earned by the simplest of things. There is an old joke about doctors that says they “get fascinated with the disease, but couldn't care less about the patient.” I have a cycle store mechanic who frequently recommends that him should perform various services or install upgrades on my road bike. Like many buyers, I'm never sure whether he is recommending additional work because my bike really needs them or he is just trying to increase his revenues.

However, it was not the quality of the work that gets my repeat business it's the fact after every service he will always call me at home that evening to find out how the bike feels, whether it needs any adjustments and so on. This impressed me. He acts like he cares. I usually accept his recommendations for additional work.

Giving Them Advice

Excellence in advice-giving requires not only the right attitude but also a careful attention to language. There are always a number of ways of expressing the same thought, each of which differs in how it is received by the listener. Saying “You've got to do this,” even when correct, is very likely to evoke emotional resistance. No one likes to be told that they must do anything.

It is usually better to say something like “Let's go through the options together. These are the ones I see. Can you think of anything else that we should consider? Now let's go through the pros and cons of each course of action. Based on those pros and cons, this action seems the most likely to work, doesn't it? Or can you think of a better solution?”

If the stakeholder doesn't want to do that, the conversation is still alive. If you've said, "You've got to do this" and the stakeholder says "No, I don't," you've nowhere to go. Your effectiveness as an advisor has just been lost, and you have placed yourself and the stakeholder on opposite sides. The odds are that what will follow will be an argument, not a discussion.

Having a Relationship with Them

In our ordinary lives, when we want to build a strong relationship we try to be understanding, thoughtful, considerate, sensitive to feelings and supportive. All of these adjectives apply equally well to what is needed to build a strong business relationship (Brooks, 1995).

To earn a relationship, you must go first. The stakeholder must visibly perceive that you are willing to be the first to make an investment in the relationship in order to earn and deserve it. Find a way to be helpful to them now. Even if it's only a small gesture, give something.

Closing

You are a Project Manger because people want you to manage the delivery of a product or service. You are a consultant because people want you to provide advice. Being able to do both is more an art than a science. Most project management consultants have learnt these skills by trail and error as our career progresses. The tips and tactics mentioned in this paper are helpful, but to apply any of them across the board will all stakeholders would be a huge mistake. The glue that binds project managing and consulting is the ability to design a process and means of interacting that fits each unique project situation to create trust. This glue can be learnt and the early benefits of earning trust are substantial and can lead to success.

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