IDEAS & TRENDS HOTEL ONLINE

Managing the Consultant: Careful Not to Doom the Project

By David M. Brudney, ISHC, September 2006

So there I was, hands gripping the armrests, anxiously awaiting that certain pain and near panic associated with one of my favorite pastimes: experiencing root canal.

Enter a very youthful-looking Newport Beach, CA Endodontist, John R. Buoncristiani. He sat on the stool next to me, flashed a great smile and shook my hand. I told him I had socks older than he.

Undeterred, Dr. B. proceeded to put my gums to sleep, place a rubber pad over my mouth with a small hole allowing the tooth in question to be exposed, fitted me with sun glasses to soften the very bright lights overhead and then placed a huge microscope peering down on my tooth and began his delicate procedure.

Typically, this is the moment that I pray for some out-of-body experience in order to extricate me from my situation, but this time I was able to simply put myself in Dr. B.'s hands and just try and "let go."

The confidence Dr. B. had earned with me

Very important to point out here - - and a valuable lesson for all of us who make our livings advising clients - - is that the main reason for why I took that "leap of faith", for why I stopped trying to manage the process and put myself in the hands of Dr. B., was the confidence he had earned with me.

What builds confidence in using any professional?

First, I (the patient/client) had done my homework.

Dr. B. was highly recommended by my dentist of 28 years. His overall professionalism, presentation, voice and his genuine concern for my comfort was the best I've ever encountered. And his able assistant, Dianna Pedroza, was the perfect "first step" and complement to Dr. B. Dianna took me into the "horror chamber" and proceeded to explain carefully the entire procedure to follow, encouraging questions throughout, and then explained the professional fees and payment schedule in a manner that would be the envy of all my consulting colleagues.

One of the hazards of consulting is that you find yourself all too often trying to manage any project you see, whether the project has anything to do whatsoever with hotels. Here I found myself in the dentist's chair, asking far too many questions, over analyzing, projecting, doing everything except simply trying to be a good patient.

And so it worked. As difficult a task as it was, I took that leap of faith and put myself in the good hands of Dr. B.

Reminded me of clients over-managing consultants

The whole experience reminded me of how difficult and unnecessary it is for consultants to get clients to avoid "over- managing" the consultant after the consultant has been hired to complete an important consulting assignment.

Far too many consulting engagements today fail to meet client expectations because the client did not allow the consultant the necessary freedom to do his/her job successfully.

I'm not saying clients should have no "control" over the consultant during the engagement. Clients should always have control, but here are a few helpful guidelines:

What Clients should avoid

- **Non full-disclosure.** Keeping valuable, perhaps sensitive information, documents, reports away from the consultant, requested or not, without valid reason

- **Limiting access.** Preventing the consultant to interview, review or interact in any way with significant members of the unit hotel team - - whose participation and contribution could be vital
- **Arbitrary pulling of key tasks.** Asking/demanding the consultant skip parts of necessary work scope because the client has determined those tasks are not that important. Please have the necessary dialogue first so the consultant may - - at the very least - - explain the importance of the task in question and its impact on the final report and recommendations
- **Economizing the project.** Attempting to downsize the project (work scope, time, fees and expenses) without sound judgment, giving reasons such as "we don't need you to do that" or "we don't think that task is that critical at this time."
- **Second guessing** what the consultant's findings, and recommendations will be

What Clients should consider doing

- **Client downloading sessions.** Demand as many client downloading sessions as client desires, but leave the consultant free to complete all of the work scope correctly and on time
- **Ask for rationale behind opinions.** If client questions or disagrees entirely with a finding or recommendation made by consultant, ask the consultant for his/her rationale behind the recommendation or opinion
- **All work scope completed.** Make certain the consultant has completed all of the approved work scope as listed in the letter of agreement, including all deliverables on time, before making final payment for services and expenses
- **Sensitive document distribution.** Withhold distributing any consulting reports assessing team member performance and skill levels

unless client has authorized consultant in advance of the project to download opinions, findings direct with staff

- **Ask the consultant** when the project is completed two questions (rarely, if ever asked by clients):
    - What did you find that you haven't put into your report? Clients might be amazed at listening to what the consultant might say
    - How would you rate us as a client for this assignment, 0-5, "5" is superior? We want to learn from this exercise so we can improve, so we can be the best client possible next time

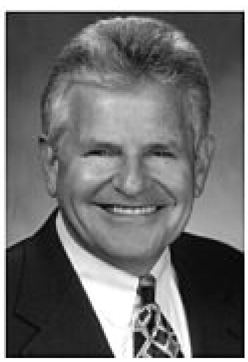
Clients should not engage any professional consultant without first doing the necessary homework. "Google" the consultant's name to see what you find. If you find little to nothing (articles published, quotes, website linkages) you may very well wind up with a deliverable that is "little to nothing". Be sure to check out the consultant's body of work, years in business, previous successful relevant assignments completed, references, professional affiliations, and fee structure, expense policies and, of course, availability. And don't hire anyone who is not genuinely interested and eager.

The consultant candidate may very well make the same positive impression as the good Dr. B. and give the client the necessary confidence to retain, but if the client is not comfortable during or after the initial face-to-face consultant interview, if that consultant was not able to earn the client's confidence by the time a letter of agreement is executed, then the client should not hire that consultant. Simple as that. Keep looking. The best ones are out there.

Find the one that's right for you, be very clear on client expectations and all deliverables and be very sure to honor all terms, conditions and payment due dates. Stay abreast of project progress via regularly scheduled client/consultant downloading sessions. Don't over-manage, don't second-guess, retain that early confidence the consultant already earned and allow the consultant to do his/her thing. And be sure and keep an open mind every step of the way.

Oh, that dreaded root canal? Thank you, Dr. B., your work was so good it was "almost" a pleasure.

What's next? Sales Lesson #2 Self-assessment. Don't leave home without it. It's a follow up to the August article, "You Cannot Microwave Experience: New Generation of Sales Professionals Lesson #1" and will appear in October.



David M. Brudney, ISHC, is a veteran sales and marketing professional concluding his fourth decade of service to the hospitality industry. Brudney advises lodging owners, lenders, asset managers and operators on sales and marketing "best practices" and conducts reviews of sales and marketing operations throughout the U.S. and overseas. The principal of David Brudney & Associates of Carlsbad, CA, a sales and marketing consulting firm specializing in the hospitality industry since 1979, Brudney *is a frequent lecturer, instructor and speaker. He is a charter member of International Society of Hospitality Consultants. Previously, Brudney held sales and marketing positions with Hyatt, Westin and Marriott.*

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