Working with Consultants (3)

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This is the third in a series of four columns on working effectively with consultants.

When you have chosen your consultant, prepare an action plan that defines what you both plan to do, by when and how you will know when to stop using their services.

All consulting is aimed at change: either fixing what doesn’t work or improving what already does work or inventing a new solution for a problem before it happens. By defining appropriate metrics and writing down the levels of the metrics that define success, you ensure that your external consultant does not become an unwanted permanent member of your corporate family. A consultant is not a permanent employee of your department. A reasonable expectation is that with time, the frequency of consultant visits will decline for any specific project. As part of the assignment, consultants normally expect to work closely with members of the client organization to impart their knowledge and methods.

Consulting fundamentally involves teaching. I met a consultant in the mid-1980s who did HP3000 minicomputer performance analysis, as I did. I asked him what tools he taught his clients to use in analyzing system performance; he answered, “Tools? I don’t teach any tools. Listen, if a client is going to spend thousands of dollars on a performance monitor, I’d rather he spend it on me.” I felt like throwing up. After I wrote about the experience in my first “Office Automation” column in 1988 for the INTEREX Magazine of the now defunct INTEREX association of HP computer users, the consultant phoned me after recognizing himself in the anonymized description. He asked, “Was that me??” and then proceeded to scream obscenities at me for five minutes (I put down the handset and kept writing something else until he stopped), ending with a threat to kill me if I ever revealed his name! This was not a consultant I would recommend to anyone.

So clients should ask possible consultants exactly how their organization will become less dependent on external help by paying for consulting time. When I created my old consulting company, JINBU Corporation (the name means “progress” in Chinese), I gave it the motto “Progress Towards Autonomy™” to summarize the fundamental notion that consultants must help their clients grow enough to dispense with the consultant’s services.

A technique that I developed – and which you can discuss with potential or current consultants – is Real Time Notes™. Whenever I’m interviewing staff members for an organizational or security analysis, I connect my laptop to their terminal so that the interviewee can see exactly what I am typing in my notes. The person can easily spot errors and make corrections or decide to suppress certain off-the-cuff comments. At the end of each interview, I use a flash drive to give the interviewee a copy of my notes right away with instructions to let me know if they think of anything else they want to add or change.

If you want to learn more about this kind of technique, you can freely download a complete narrated PowerPoint lecture on “Leadership Skills”<http://www.mekabay.com/courses/academic/norwich/msia/leadership_skills_ppt.zip> or a section on “Analytical Tools” <
The next (and last) column on this series looks at professional codes of conduct for consultants.

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