



Consulting for the forest, not the trees

SEP 25, 2022

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As technical consultants, too often we find ourselves relegated to providing guidance for a specific project with no real context of the larger picture. Perhaps this phenomenon is based on our relationship and history with the client, or perhaps the client naturally keeps their long-term strategy close to the vest. Regardless of the reason, to be effective consultants, it is to our client's advantage to share the ultimate goals and objectives of the organization with us, their technical advisors. A broader view of client objectives allows us to add value and, in some cases, recategorize what were once viewed as isolated projects into stepping stones that line the path to the client's ultimate goal.

In order to gain insight into our client's organizational objectives, we must first build a relationship of trust by taking a genuine interest in their long-term success, not only in the outcome of a single project. However, conversations that facilitate trust are generally unnatural to technical professionals and don't yield immediate results. Strong relationships can take years to develop and are often built upon consistent client experience over

various clients' strategic goals, we must also be wary of being caught on an information island. When establishing long-term organizational goals, it is important to solicit and intently listen to forthright feedback from all client decision-makers. When each stakeholder concern is thoughtfully considered and addressed, we will ultimately achieve greater consensus and investment into strategic objectives, and subsequently, the agreed-upon priority of project implementation, even if the group ultimately overrules some individual's concerns. Simultaneously, this approach helps limit wholesale revisions and reworking of plans that regularly occurs when all perspectives have not been considered.

- + **Knowing our strengths.** Once an objective and the path to success have been established, we can commence our more technical or project level work, always keeping sight of the client's organizational or bigger-picture goals. But it's important to not overextend beyond our technical or professional capabilities. We must understand our client's needs and identify where outside expertise could help deliver success. There is great value in identifying and incorporating the best resources, whether they are within or outside of our firm.
- + **Change is constant.** As advisors to our clients, we must remain adaptable to changing personnel and outside influences that may alter the target mid-course. Verifying that goals have not changed at major implementation milestones can provide reassurance that there is still a consensus among client stakeholders. Likewise, it is prudent to reestablish goals and implementation priority as new stakeholders are introduced to the team. As consultants, we should be prepared to offer a change in direction if the established path no longer serves the client's best interest.

As we cultivate deeper client relationships, we are able to have more candid conversations about the true goals of the organization that reach beyond the scope of a single project. In doing so, we can increase the value of our services by providing a more holistic approach to a series of projects. Although the method helps streamline the path to the ultimate objective, it is important to ensure consensus among client stakeholders, assemble the team that best serves the client, and understand that some adjustment to the plan is inevitable. We must always remember that we are at our best and most valuable when we are consulting for the forest, not the trees.

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