Article

Why Are We Here? (Part 2):

How to ensure the initial dialogue between client and consultancy gets off to a flying start

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Introduction

"Why are we here"? – Delving below the obvious

In my previous article (Why are we here - Part 1), I provided guidance to those thinking of using third parties on how best to approach the initial dialogue with the consultant. In this second article I spin the table and look at the same opening conversation but from the consultant viewpoint. In other words, moving from the customer question "why are you here" to the consultant asking "why am I here"?

Customers do not want products and services!

Customers may think that they need products and services, but what they are really looking for are solutions to challenges they currently have or will experience soon.

They may believe that they have all of the answers and have already drawn their own conclusions on what is required to fulfil their needs. The disadvantage of being too prescriptive in articulating this is that they don't draw on the consultant's knowledge and experience. I covered this to some extent in Part 1 by talking about customers preparing themselves for briefing the consultant and the need for truthfulness.

A well prepared brief will equip the consultant with a broad outline of the overall drivers and underlying issues; however that's only part of the story. Consultants like me have a duty to ask questions in areas that the customer hasn't even considered or feels insignificant.

It is important to capture as much information as possible to build the overall picture and hence for the consultant to be able to provide the best possible advice. To use my medical analogy again, a doctor will ask a patient questions not only about a current ailment but also about related topics such as lifestyle, other medications, family history, etc.

So, to aid the intelligence gathering, I have set out the following consultant led questions that will ensure effective knowledge transfer in a relatively short time frame.

The nitty-gritty!

Firstly, get a grasp of the **organisational and management structure**. This helps in not only understanding the hierarchy but also individual names and where they fit in the organisation. The depth of relevant information will differ and it is not proposed that full organisational trees for a large multi-national is necessary, but appropriate IT operational or project structures will help in identifying ownership, roles and responsibilities. In addition, how diverse is the **geographical** dispersion?

Next, establish the **relationships** that exist. For example, **customers**; how many? What are the main location sites? Are service level agreements (SLAs) in place? How satisfied are they with the service (at senior and user levels)? Do any create specific challenges or are more demanding of IT? **Suppliers and partnerships** need similar investigation; who are they and what services do they provide? Again, are SLAs (in place and updated periodically)? Are performance reviews conducted? Finally, what are the **internal** relationships (e.g. applications management, networks, datacentre)? Do Operational Level Agreements (OLAs) exist? Is performance measured and are reviews undertaken?

To get truly under the skin of the organisation get an understanding of the **culture** across both IT and the business. What is the attitude to Change? Are there any underlying tensions (e.g. between service providers, departments, etc.)?

What is the **resourcing strategy**; the permanent staff vs temporary/contractor ratio and where are they used? Are services outsourced/insourced and are there any plans to change the strategy?

The most important area involves **people**. Are roles identified, documented and communicated? What is the level of their awareness and the training received (both ITSM and tools)? How are their capabilities and requisite skills managed (e.g. performance monitoring, reviews and incentives)?

How does IT **communicate** to staff, customers, partners (e.g. events, new services, changes, major incidents)? Additional to this, is any **measurement and reporting** performed (i.e. what, to whom, frequency and any action taken as a result)?

What **processes** are in place? Are they documented (e.g. policies, process flows, RACI matrices)? Are the processes interrelated? Is there a service catalogue in place? What **technology** is used (e.g. ITSM solution, Service Desk telephony, discovery tools, event monitoring, Intranet/SharePoint, asset management/CMDB)?

Operational questions cover a wide spectrum and a lot of the detail will be established later in the project but it is good practice to ascertain if there is a Service Desk or single point of contact for IT. Have there been any major service disruptions recently? Are there procedures in place for handling major incidents? Is there a service continuity or disaster recovery plan?

Financial control comes next. Are budgets set and managed on a continual basis? Are customers charged for services (if so, how)? Is the cost of providing a service known?

To add to the intelligence gathering exercise it is also wise to capture tangible information in the form of **volumetrics** (e.g. number of staff; service desk/operations/development, number of incidents per month, number of changes per month, % first time fixes, hours covered, etc.). As this data may not be readily available it is sensible to send a template to the customer in advance of the interview.

Summary

Beyond establishing the customer's business drivers, vision, objectives, timescales and desired outcomes there is a lot of peripheral, but equally important, information that can be gathered by a consultant like me at the outset of a project. A rounded view not only enables me to articulate proposals customised to the organisation in question but also helps build a comprehensive perspective that will reveal early on any risks and constraints that will need to be managed during an assignment, thus avoiding surprises later in the project.

So, be prepared, ask questions and record all information received. It will enhance your position as trusted advisor and hopefully establish a long running professional relationship.

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