

Client, Consultant and Contracting

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If you study you will learn. This is what I was told by elders, teachers and others. But I was never a book person. I always found it difficult to read and learn, to understand those long sentences and learn from theories. Over a period of time I realized it was ok to be unfriendly with books. While I pursued my OD course, we had a lot of books to read and one of the faculty members said, you need to acquire scholarly knowledge. I related scholarly knowledge to books and that made it seem as I would never be able to get there. Today as an OD consultant, I realize my greatest learning's have been through experiences.

In this article I would like to share my experiences of **contracting with a client in my role as an OD consultant**. I will narrate some of my experiences to share how I learnt about contracting. When I was Learning and Development Manager in various organizations, consultants would get in touch with a prospective client to sell their services. It could be trainings, organization development or any other technical service. (I would like to be specific about L&OD in this article, since that has been my focus as an employee and as a consultant.)

Contracting was more of paper work and less of dialogue. The consultant would share some details on costing and the steps involved in the assignment. That would be agreed by both parties and a document would be signed. As an employee this is what I saw consultants do. Here my focus is from the perspective of an external OD Consultant.

In my initial journey of a consultant I did exactly what most consultants do. I tried to sell my services to prospective clients. This experience of selling de-motivated me and also made me question why did I leave my job? After some selling, I realized I am trying to tell a client that look you need change and I can help you change. Why, would someone want that? Does the client really need someone out there to tell him that your organization needs to change? And I was doing just that. (as an employee I felt irritated when a consultant who dint even know what happening in my organization, would tell me your organization needs to do this to get there), here I was doing the same thing. So, my first big lesson was an OD consultant is called when there is a need for change; he **cannot sell the need for change**. When an organization is in need of change it will find you. (As a consultant it also means a lot of patience and maybe going without work for days or months which got frustrating)

As I started working I realized that by not selling my services I have some benefit also. In my own subjective view the person buying becomes the one with power and the person selling becomes the one who is in need. It creates an unconscious UP and DOWN in the relating. So, when an OD consultant sells his service, he has already created the dynamics with the client of

the client being the provider and the consultant the receiver. This becomes the first relating and it seems to me that the relating is not of equals. The client takes the demanding position and the consultant a needy one. Is the consultant in an equal position to say no to the client, just like the client may say "I don't think we can work together?" (unless he cannot deliver or commercials are disagreed). So I realized it is important for me to **create an equal relationship with the client**. Now how does this work to my benefit. I am sharing some things that I share with my client in my contracting meeting to give more clarity on creating an equal relation with the client.

The purpose of the contracting meeting is to share with the client my approach of work, my values and methods. I ask the client how he feels about it, his commitment to the process and why he wants to do the assignment. I tell my client (Head of organization) "while you are contracting me, my client is really your organization. To me you and your employees are equals; I may be required to give you feedback, just like I may give feedback to others. How open would you be to receive feedback from me? It may at times be in the presence of your team members".

"I may be brought in by you for the assignment; however my role is not to represent you to your employees. I see my role more to be able to help in building leadership capability and a culture of transparency in your organization. This could include working with you in your role as a leader and your ways of engaging with your members". Most times the client is taken aback when this is said, but in my own view, when a leader is open to change, then the organization is. If the leader resist, there is little that can be done.

The first Consultant-Client meet is very important. This is a space where I can really gauge can I work with the client, will we be able to respect each other's values and work ethics. In this initial meeting I would like to spend undisturbed time with the client. The meeting is an exploratory meeting, to understand each other.

In this contracting meeting I also share with the client about my boundaries. My learnings on **boundary management** become more and clearer with every assignment. Something's I would say to a client are, "I would talk about the assignment only in the presence of the members we have agreed to do work with. The assignment will be done in context to a certain role. The work I do will not be used as an evaluation of any individual. I would not engage with the client beyond the agreed role". I remember once when I was engaging with an organization, the client called me a day before the leadership workshop and said that "I want to share my anxiety about the workshop". While I would like to be sensitive to what the client is feeling, I said to the client, "I would like you to share what you feel in the workshop tomorrow. My role does not permit me to engage with you on this, in the absence of the other members of your organization". I don't know how the client felt about my saying no then, but when she shared her anxiety in the workshop, it created a space for dialogue and other members to share their own feelings around the anxiety. The client later told me, "I was very angry at you for not listening to me when I wanted you to, but now in retrospect I am glad you did not listen to me".

So, there are times when a client expects you to go beyond your agreed role and it is a seductive process, because you feel powerful that here is a person who needs my guidance / help. However can I refrain from doing so? In my role of a consultant I value treating all members equally and with transparency. The minute I engage with my client outside the agreed boundary, I create dependency and a relationship outside the consultant-client role.

Moving on to the next learning ***whose need is it for change***. When I read my OD texts, there was so much written on change, it almost seemed like the same thing in different words. I remember reading about the need for change, back then I was not able to put it in real time context but now I see the importance of this question, whose need is it for change?

Consultant would want their work to be successful and change to happen with their efforts. However, the question I would like to put forth is, whose need is it for change? When the need for change becomes the consultants, then the consultant becomes anxious to see success (as he understands success) and the client may experience that as force. This anxiety also comes in the way of the consultant engaging with the client. He could be under the pressure of performing for success. I see my role as a consultant to be able to facilitate the process, to create awareness in the organizations about its blocks and bring multiple perspectives that can be explored. I cannot guarantee change (and I wonder who can). So, when a consultant is free from the burdening himself of the need to bring about a change, the consultant gives space to the organization to take charge of itself. Change is a process and it takes time. When I can look at what is the current reality, I work from that reality. There is no fixed model, I work with. So, my ***contracting is in phases***. I first engage with the client on the immediate next step and the steps after that emerge. For instance, one of the client asked said "I want to create more leaders; I want to be able to move out from my operational role to do a more strategic role". So, I would start from here. In this case, I explored with the client the first step. We agreed to work with the team that reports to him, his next line of employees, he sees as leaders. We did a workshop with this team, including the leader. The focus of the workshop was to explore the blocks of the team. Here I gave a proposal for just this phase. Once this phase was over we met again and discussed the next steps. In my view when I work in phases, the client can see the impact of each step and gauge his own feelings around what can be done next. The client is not bound by committing to a longer process but can see the impact of smaller phases. It also works, to the client's benefit, since organizations reality is constantly changing.

Another important part of contracting is knowing who is ***the key decision maker for the change process***. This person is the one who drives the change initiative; he becomes my point of contact to give shape to the change process. All communication about the initiative comes from this one person. In one assignment I was working on there were 3 leaders, one phasing out director, one appointed director and one new director coming on par. In this particular assignment I asked for who would be the decision maker? Who would be the decision maker for this change initiative? This one person became my contact client, to discuss about the process, the impact, the changes and the feedback. There is also a possibility of having two points of contact, however in this kind of a scenario I would communicate with both members

together. The communication would be a common one and decisions also when both agree on what needs to be done.

These are my some of my experiences and learning's in my journey as an OD consultant. They would keep growing and I hope to keep writing about it... So, good luck to all the consultants out there who are ***“using themselves as an instrument of change.”***

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