

**CHAPTER 5**

**ASSESSING CLIENT NEEDS**

## **The Practice of Professional Consulting**

Consulting and consultants have become ubiquitous over the last twenty-five years. With the growth has come a wide range of opinions about its efficacy, value, definition, professionalism and status. We stated earlier that a working definition of consulting is:

*“A professional who can be trusted to use standard consulting methods and procedures; that gives advice, and produces solutions on behalf of clients.”*

This chapter explores how this generic definition is applied to the very important first step in any consulting assignment – assessing client needs. We discuss core interpersonal skills in listening and questioning, the importance of understanding the client business, as well as the kind of leadership and influence consultants need to exert in needs assessment meetings and conversations to ensure this first step reaches a productive conclusion. In fact, each of the next four chapters begins by discussing aspects of leadership and how professional consultants must exercise such leadership to provide direction, raise client confidence and produce results, throughout each of the four stages of the consulting cycle.

### **CONSULTING LEADERSHIP – VISION AND DIRECTION**

Leadership is a very big topic and even a cursory discussion of the subject is beyond the scope of this book. However, it is very important for any consultant to think about what it means in practice; what it means, personally, to be a leader. It is important to consider the link between being professional and being a leader. We know that to be professional means that someone is trained to a high degree, is trusted to use acquired expertise and to behave ethically. With that responsibility carries an expectation on the part of the public (and clients) that the person represents the profession; is a role model; and a standard that others may emulate. This is an act of leadership and is central to how a consultant ought to think as worked is performed throughout the entire consulting process.

By “leader” we do not mean that the person *has* to head a national association or be the managing partner or president of a firm. That is leader as a noun, by position. *Leader* is also a verb that reflects the person’s mindset, desire, ability, motivation and behavior to represent the profession. In general, we view leadership as requiring four verb-functions: 1) Setting direction with vision and strategy; 2) Mobilizing people’s commitment and motivation to the vision and strategy; 3) Managing implementation to ensure performance drives the strategy; and 4) Enhancing adaptation and alignment so the vision, strategy and performance can be accomplished.

So, what does leadership mean in the field of professional consulting? We begin with a brief overview of how consultants must set direction with a vision of the client’s problem(s) and a description of the strategy for achieving that vision, which spells out how they will work with the client to produce a solution.

## **The Practice of Professional Consulting**

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**Strategy Thinking in Consulting.** If we were to look at the essence of strategy, it is two things: 1) a statement of goals and activities; and 2) a way of thinking. First, as a statement of goals and activities, strategy is the identification of a future state, of a set of goals, which the consultant wishes to accomplish. Obviously, the goals are tied directly to both the needs of the client and the solution both parties wish to produce. In order to produce those goals, the client and consultant working together (and sometimes independently) must undertake a set of specific activities. For a consulting firm those activities are the firm's strategy and represent a unique way the firm and its consultants deliver services. They represent how goals will be achieved. Michael Porter of Harvard Business School is the most vocal proponent of the idea of "strategic activities" in which he says that three conditions must be met for a strategy to be successful:

1. Each activity must contribute directly to the goals.
2. The activities must mutually reinforce themselves.
3. Each activity must be optimized.

What does this mean in consulting? It means that to achieve a consulting goal (to solve a problem) each role and task in the consulting process requires a number of discrete activities. Each consulting activity (e.g., developing proposals; building a prototype; or conducting a project status review meeting) must contribute directly to accomplishing the consulting goal and only those activities are performed which do so; synergy of activities is sought; and the activities are optimized when they are performed. This is the professional responsibility of everyone involved -- individual consultants, team members, project managers and engagement leaders -- who must strive to ensure these conditions are met.

The second aspect of strategy, *strategic thinking*, is the process by which consultants and clients think about a problem and this can be done analytically and contextually. Analytical thinking occurs when we examine a situation or problem by taking it apart; by breaking it down into its components; looking at the parts; generating data; comparing and contrasting data, then drawing rational and logical conclusions from what we have found. Contextual thinking, on the other hand, is looking at the client's situation or problem in terms of the environment within which it exists. In this bigger picture or larger context, reside issues, data, patterns of behavior, facts, perceptions, purposes, intentions, structures, and opinions, etc., that help to explain how the client's problems is impacted (or caused by) something in its environment. Taken together, contextual and analytical thinking help to define the way consultants needs to think, as well as the activities needed to identify and explain the problem.

The premise of this perspective is that from this kind of analytical-contextual thinking, consultants will uncover a way to solve a client's problem. This work in the legal profession is called "discovery." In consulting, such discovery work begins the development phase and helps us to formulate a direction for working with the client.

As with lawyers, key technical and interpersonal skills are needed by consultants to be highly effective with the discovery process. Most of the rest of this chapter explains in detail the skills needed by consulting practitioners to perform such discovery.

## **The Practice of Professional Consulting**

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**Setting Direction.** Once the client's situation and problem are understood it is then possible to formulate a course of action (strategy) and to craft a statement -- called a proposal. The proposal explains what is to be accomplished (goals), how the goals will be accomplished (activities), under what conditions the work will be conducted (context), and the rationale or justification for the recommended approach (analysis).

Writing, submitting and defending a proposal is an act of leadership – leadership of thought, of people and of action. It enables the consultant, the consulting team, the client, and the client's organization to understand what the consulting strategy is and how it will be accomplished.

In short, *strategy* and *setting direction* in consulting are very important leadership roles during the developing and designing phases of the work, without a clear definition of which it is unlikely that business can be won, or if won, successfully fulfilled.

### **THE DEVELOPING BUSINESS STAGE**

The developing business phase in consulting is the art of finding and winning business. *To understand this stage and how it works in context, in the real world, for the rest of this chapter let us assume that we are starting right at the beginning of the consulting process. We have an opportunity to develop new business with a prospective client and we are meeting with that person for the first time.*

As a result of a concerted marketing effort, sales work and reaching out to our personal network, at some point we get a call to meet with a prospective client to discuss their problems and to see if we might be able to help. At this point we clap our hands and beam with excitement -- we have been given a chance to talk about what we like to do; to talk about ourselves; to solve a problem; to enter a new client organization; to turn work into profits. We now have the great challenge of winning the business.

In meeting with a prospect for the first time we must assume that the client is talking to other consultants and consulting organizations. This assumption should automatically trigger the desire to be as prepared as possible. We should ask ourselves "What do I have to do to differentiate myself and my firm?" "How can I learn as much as possible about the client by asking the right questions, understand the problem, and show the client that I can really solve the client's problem? As someone put it: "*Success is where opportunity meets preparation.*" Preparing and asking such questions is crucial. Broadly speaking, at this stage there are three areas that require in-depth preparation that we will examine in the next sections and later in the next two chapters.

1. Understanding the client's business and industry.
2. Developing a questioning strategy to learn as much as possible.
3. Knowing exactly what to say about yourself and your firm.

### **UNDERSTANDING THE**

## The Practice of Professional Consulting

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### CLIENT'S BUSINESS AND INDUSTRY

It is important to realize that clients do not expect you to know as much about the client's business as they do. Nor do clients expect you to know that much about their organization, let alone the client's specific problems. However, clients do expect you to have done your homework by studying the items shown in Table 5.2. By studying as many of these items as is possible, it will be easier to develop a strategy and structure for the prospective client meeting and developing a set of questions that must be asked in order to understand the client's problem.

Once prepared as fully as possible and armed with meeting goals, agenda, and support materials, consultants must use three basic skills during the meeting: 1) asking the right questions; 2) listening effectively; and 3) structuring a question strategy. Those skill sets seem disarmingly easy and obvious, but turn out to be difficult and crucial to winning business. We will examine each of these in sequence.

**Table 5.2 Sources of Information for Preparing a Client Meeting**

ITEM	WHAT TO LOOK FOR
The organization's annual report	<ul style="list-style-type: none"> <li>• Business sectors, products and services</li> <li>• Change in financial condition by sector</li> <li>• Chairman's introduction – key issues</li> <li>• Board members' affiliations</li> <li>• Names of key executives by function</li> </ul>
10K reports (publicly available SEC filings)	<ul style="list-style-type: none"> <li>• Names of company officers</li> <li>• Changes in structure affecting products</li> <li>• Financial condition, concerns</li> </ul>
Analysts' reports from services such as Value Line, Standard & Poor's, Moody's, Hoover's	<ul style="list-style-type: none"> <li>• Industry dynamics and key trends</li> <li>• Business sectors, products and services</li> <li>• Performance of sectors</li> <li>• Rationale for any forecasts</li> </ul>
Newspaper and reputable magazine articles	<ul style="list-style-type: none"> <li>• Industry dynamics and key trends</li> <li>• Business sectors, products and services</li> <li>• Performance of sectors</li> <li>• Rationale for forecasts and conclusions</li> <li>• Indications of culture (values, beliefs)</li> </ul>
The organization's Website	<ul style="list-style-type: none"> <li>• Business sectors, products and services</li> <li>• Chairman's introduction – key issues</li> <li>• Names of key executives by function</li> <li>• News items on the organization</li> <li>• Indications of culture (values, beliefs)</li> </ul>
Promotional literature the organization makes available	<ul style="list-style-type: none"> <li>• Business sectors, products and services</li> <li>• Any commentaries – key issues</li> <li>• Names of key executives by function</li> <li>• News items on the organization</li> <li>• Indications of culture (values, beliefs)</li> </ul>
The organization's service and product offering	<ul style="list-style-type: none"> <li>• Range and scope</li> <li>• New products and services</li> <li>• Markets and customer use</li> <li>• Inventions &amp; copyrights</li> </ul>
Any existing files in your firm about the organization	<ul style="list-style-type: none"> <li>• Details of previous consulting assignments</li> <li>• Reasons for success, failure</li> <li>• Indications of culture</li> <li>• Anyone you know who knows the organization</li> </ul>

### **1. NEEDS ASSESSMENT – QUESTION SKILLS**

Questioning and listen is the art of being able to tune into the client's verbal and non-verbal communications and to respond with questions that uncover deeper and deeper issues that eventually reveal the client's problem. Effective consultants ask questions all of the time, of many people about many different things. At the same time, most consultants believe themselves to be good listeners when in fact they are not. If we are not very effective at questioning and listening, the outcomes we produce while meeting a prospective client and conducting a needs assessment will be less effective, even useless, wasting everyone's time.

To make needs assessment meetings productive it is a good idea to develop a "question strategy." This set of questions, prepared in advance and asked in sequence that takes the conversation from general knowledge and issues to specific insights about client needs. In addition to sequence, questioning skills also requires be conscious of what is the best type of question to ask.

**Types of Questions.** Questions come in a number of *generic* forms - - as closed, open, leading or loaded questions.

1. **Closed questions.** These lead to "yes" or "no" answers or a choice among alternatives. Therefore, closed questions tend to be quick and enable the consultant to get specific details. The client is "pinned down" and when answering such questions must share a mental decision made about the item under discussion, such as preferences and specific requirements regarding such things as the scale, scope, or magnitude of the problem; causes, effects, implications, and dynamics of the situation.

A good model for seeing the value of closed questions are television interviewers who have a limited amount of time to get a guest to open-up and share something interesting, but without using up too much time to say it. The interviewer usually begins by asking the guest lots of closed questions to establish a context or establish certain facts. The strategic reason for using closed questions is to control the time the guest has to speak and to get certain information. This is also true for the consultant who usually has limited time available with the client during the first meeting, but must get a lot of facts and insights very quickly. Closed questions are designed for those purposes.

2. **Open Questions.** On television the interviewer shifts from closed to open questions, which are the opposite of closed questions. The intention is to get the guest to open up, to explain and describe, to elaborate and expand, and thereby provide a lot of information. Consultants must do the same thing. Open questions usually include phrases such as: "Please explain, or describe, or expand..." Such questions may take a long time to answer, so they must be asked sparingly and carefully. Long answers may require interruptions by asking closed questions that guide and

## **The Practice of Professional Consulting**

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clarify things or help the client to explain things more accurately. Open questions are key to gaining breadth and depth of understanding about the situation and the nature of the client's needs, but they run the risk of the client going off on tangents and wasting time.

3. **Leading Questions.** Leading questions do just that – they lead to an answer the consultants wants, by suggesting the answer in the question. For example:

- *“Don’t you think it is about time to stop others from having access to that information?”*
- *“Wouldn’t it be wise to choose a strategy of efficiency and quality rather than one or the other?”*
- *“If you wish to improve your leadership, will this decision be communicated sooner rather than later?”*

Leading questions can be useful to clarify things, get action or a decision, but they must be used with caution. They may be perceived as premature or pushy, even inappropriate or arrogant for the consultant to ask at such an early stage of the relationship, when the level of trust is low and there are so many unknowns in the relationship. So, when they are used, they should be used wisely, thoughtfully and politely. They can be softened with a pre-amble such as: “Forgive me for saying so...but...”, or “If you don’t mind my saying...perhaps...”, or “I know I don’t know very much about the situation yet, however...could you....”

1. **Loaded Questions.** Inexperienced consultants or experienced consultant with low emotional intelligence may ask loaded questions. Loaded question are similar to leading questions but usually have a built-in negative judgment to them and are often compounded by being asked at the wrong time and in the wrong way. For example, “Do you think you will ever get it right?”, or “How long do you think you will be in this job?”, or “Wouldn’t it be smarter to read the manual first?” In general, loaded questions should be avoided as they tend to make the client feel uncomfortable; such questions may be seen by the client as being rude, the consultant trying to control the interview or get a preconceived answer.

Consultants must also be aware of the fact that questions can be asked in simple, clear, confusing, serious or humorous ways. Experienced consultants know how easily poorly framed questions asked with the wrong tone, can reflect a personal bias leading to misunderstanding, inaccuracy, and a distortion of the truth. The key is being intentional with our questions such that we choose the questions we believe will enable us to achieve the needs assessment goals. The keys to asking good, “mature” questions is preparation, careful listening, avoiding confusion, using emotional intelligence, and knowing when to be humorous and when to be serious.

In summary, loaded, closed, open, and leading questions are options one can choose to use in any conversation during the consulting cycle, but during needs assessment meetings, consultants must be

## **The Practice of Professional Consulting**

particularly conscious of what they are asking, their tone, and whether the type of question used will yield the information they seek and contribute positively to building the relationship.

Obviously, effective questioning is a skill and to get better it needs to be practiced. One strategy that can help improve our needs assessment is bringing a colleague to the client meeting that has the discipline and skill to ask the right questions in the right way. This enables one consultant to ask questions while the other listens and takes notes. However, listening itself is an art and requires attention.

### **2. NEEDS ASSESSMENT – LISTENING ACTIVELY**

Equally important as asking the right question is having the right listening mindset; to being present to listening to the answers. Everyone hears, but do we listen? Listening has many problems such as people listen superficially, intermittently and judgmentally. People tend to listen with “filtered” ears, filtering what they hear with biases; or they are distracted by something happening in the environment. Generally, men seem to have a more difficult time with this than women as women tend to be more relationship-oriented and more interested in people; men tend to be more interested in “things” or objects (Gilligan, 1982; Gray, 2004; Tannen, 1994). Luckily, listening is a skill that can be improved with some practice.

To address the problem, the most common listening skills taught in human relations, negotiating, influence, and management training programs is called *Active Listening*. It is a skill that requires a conscious effort to use the enormous excess processing capacity we have in our brains. When someone is speaking each of us rapidly goes through several stages of action and reaction. First we hear the words, then we make connections in our brain to make sense of what we have heard, usually accompanied by some emotion, then we think about a response; and we may even quietly rehearse what we are going to say to the other person before we say anything. All of this happens in a very short moment of time. And all of this may be going on as we form a question we wish to ask, or craft a counter argument, or relate a similar experience, or tell our story. The problem is that while we are concentrating on our internal responses and rehearsals, we have stopped listening with our full attention; we are not *present fully*. It starts a downward spiral. The longer we rehearse and play our internal, mental movie scripts, the worse our listening becomes until we completely lose touch with what the speaker is saying and we completely miss the other person’s points and ideas. When we suddenly realize we have not been listening or have missed something, we often feel too embarrassed to ask what the person just said, so we let it pass, perhaps missing some additional vital information as we become focused on our own feelings, listening even less!

Again, we engage in the internal conversation because we have excess processing capacity in our brain and the brain is always processing information, “looking for something to do.” The voice in our head wants us to focus on it, not the other person. It can be a struggle to concentrate on the other person if:

## The Practice of Professional Consulting

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- The language is hard to understand
- The concepts are too vague
- The environment is noisy
- The person speaks very quietly
- The person has a difficult accent
- The speaker has unique accent
- The person speaks too fast or too slowly

With all those barriers to communications, it is necessary to develop listening skills to put our brain's excess processing capacity to good use. Table 5.3 shows the questions to pose to oneself in order to actively listen. Active Listening is a verbal, behavioral skill we consciously apply as we are listening to the words, ideas, logic, and expressiveness of the speaker. It enables us to use our excess processing capacity to multi-task in a constructive way by asking ourselves five questions:

1. Am I *paying attention* to and concentrating on the speaker words and emotions?
2. Do I *understand* what the person is saying and does it need clarifying?
3. How would I *restate* what the person has just said?
4. How does the *person feel* about what is being said?
5. What are the *key points* or *message* the person has just made?

As a *pro-active skill* the consultant must from time-to-time interrupt the client using any one of the five techniques in Table 5.3. Active listening assumes that the client will not be offended by the interruption, but in fact will become motivated to share more and more as it becomes obvious the consultant is really interested in what is being said. This is a very positive message that reinforces more communication. The client realizes (consciously or unconsciously) the consultant must be listening to be *able* to restate or clarify what the client has said. Even if the message was mis-heard, a good clarifying question shows interest and enables the client to correct the perception.

**Table 5.3 Active Listening Techniques**

Active Listening Technique	Questions for Oneself
ATTENDING	▪ Am I paying attention and concentrating on the speaker words?
CLARIFYING	▪ Do I understand what the person is saying and does it need clarifying?
RESTATING	▪ How would I restate what the person has just said?
EMPATHIZING	▪ How does the person feel about what he or she is saying?
SUMMARIZING	▪ What are the key points the person has just made?

For some, learning how to interrupt takes practice. It feels awkward, even rude to do so. But if practiced and done respectfully, it will seem natural and it will enable the client to continue with his or her line of thought, feeling good that the consultant is in fact, really listening. Bear in mind, however, not

## **The Practice of Professional Consulting**

to interrupt too frequently and summarize only at the end or half way through a very complex presentation of data or idea. One key to effective active listening is to ask oneself: “Am I conducting an interrogation here?” No one likes to feel interrogated. But people like to hear their own name mentioned frequently and to know that others are genuinely interested in what they have to say. By using active listening to do these two things and to gain a deeper, more accurate understanding of what the client is saying, consultants will be well on their way to becoming a consummate professional in this important area.

To summarize, by developing the habit of listening actively, the consultant will be using emotional intelligence and gaining many benefits, including:

- Learning how to concentrate better
- Being “present” (not distracted or disengaged)
- Building stronger relationships
- Learning a great deal more from others
- Generating creative ideas
- Seeing patterns in information
- Being seen as courteous and curious
- Having others listen in return
- Increasing personal motivation to solve client problems

Effective consultants know that the skills of asking good questions and listening actively are not only extremely important for conducting needs assessment during the Development Stage, but in every role of the four steps of consulting. Both skills should be practiced and used frequently.

### **3. NEEDS ASSESSMENT – A QUESTION STRATEGY**

Armed with questions and listening skills, we can now develop more deeply the idea of creating a “questioning strategy.” A question strategy simply means that you have 1) thought through the questions you wish to ask; and 2) decided upon the sequence in which to ask those questions before meeting with the client. Both elements are very important. Asking a random set of questions that do not seem to have a logical starting point and then do not take the conversation to a practical end is useless and may confuse both the consultant and the client. Worse, the client may conclude the consultant is not well prepared, or think she or he is just “fishing” and lacks the kind of mental discipline needed to solve the problem. If those perceptions start to take place in the client’s mind, the consultant has lost even before the business has started.

One of the best ways to think about a question strategy is using the ideas and excellent work of Neil Rackham (1988). In his book: “SPIN Selling”, he discusses his research of the factors that differentiate highly successful sales people from those who are not. Unequivocally, he concludes that

## **The Practice of Professional Consulting**

sales people who use a process of enquiry and investigation to “earn the right” to offer a product or service stand a much higher chance of success than those who do not. Earning that right is directly related to 1) the questions the sales person asks (open, closed, leading); 2) the questions’ content; and 3) the sequence in which questions are asked. Customers and clients are much more likely to buy if the sales person asks questions in a sequence that forms the acronym “SPIN”, that is to first ask *Situation* questions, then *Problem-oriented* questions, then *Implication* questions, and finally *Need-Pay-off* questions. Thus, a question strategy is a planned, logical sequence of questions that gives the consultant the breadth and depth of information needed to draw conclusions about the nature of the client’s problem, and yields insights into ways in which the problem may be approached and solved.

**Situation Questions.** These questions enable the consultant to add to the arsenal of information gathered during his or her preparation and to gauge the size, scale, and scope of the situation to be dealt with. For example, if the consultant is being asked to design, develop and deliver a training program in response to a performance problem such as workplace harassment or a drop in productivity, an obvious situation question would be: “How many harassment accusations and cases have you had over the last year?”, or “How many people need to be trained?”, or “Do you have internal training professionals that would need to be trained?”, or “Have you had training in this area before?” Or, “How do you measure productivity currently?”

**Problem Questions.** These questions focus on the precise nature of client problems including breakage, loss, cost, quality, or timing problems. Such questions might be: “What types of harassment problems have occurred most frequently”, or “When you had the last harassment case, what concerns do you have about how well was it handled?”, or “How serious would you say the harassment problem is?”, or “How effectively has the company’s training addressed the problem?” Note the word “problem” or “concern” is used in the question itself.

**Implication Questions.** These questions enable the consultant to demonstrate an ability to think laterally about the problem and to get the client to see other problems that perhaps the client had not seen before. This has the impact of increasing the seriousness of the immediate problem and shows the client that the consultant’s experience and skills enables him or her to see connections between internal problems; problems that effect economic, cultural, political, or organizational issues. Such questions might be: “If you reduced the number of harassment cases, how would this impact your recruiting strategy?”, or “If productivity training in this department is successful, how would that impact the corporate training budget?”, or “Do you think that the union contract negotiations will go better if you demonstrate immediate action in this area?” Implication questions enable the consultant to keep framing and reframing the problem as it is being described, so that the actual problem becomes clearer, smaller, larger, more accurate or even more complex than previously believed.

## The Practice of Professional Consulting

**Need-Payoff Question.** These questions are used at the end so that the client can put the consultant’s recommended approach or solution in context; the client realizes that any suggestions about products, services, or approaches to solving the problem are done so with an informed opinion by the consultant. Since every organization thinks its situation is unique, clients generally are not receptive to hearing that a solution that worked in company “X” will work in theirs. While it may be true that the same solution could work, clients need to be assured that the consultant’s prior experience is merely the basis for addressing the unique aspects of the client’s problem. Need-payoff questions examine potential solutions, how the client likes to work with consultants, and what the benefits would be by taking the approach being discussed to solve the problem.

In short, if the client believes the consultant has truly listened, understands the issues and the problem, has asked relevant and helpful questions, the client will be much more receptive to hearing the suggestions made by the consultant. The consultant now has “earned the right” to make such suggestions by using the SPIN Questioning strategy.

We cannot stress enough the importance of doing one’s homework and being prepared before meeting with the prospective client. Developing a good SPIN questioning strategy, using active listening skills and emotional intelligence will enable the consultant to be in the best possible position to win the business – at least on a straight forward and objective basis.

**Table 5.4 Using SPIN Questions to Win Business**

Question Type	Characteristics	Examples
SITUATION	Ask neutral and factual questions; gathers data about the client’s organization and situation.	<ul style="list-style-type: none"> <li>▪ How many people work in the department?</li> <li>▪ When did this start?</li> <li>▪ What is this costing you?</li> <li>▪ How many desk-tops do you have now?</li> <li>▪ Do you have resources that could be used in this project?</li> <li>▪ How many people could we interview?</li> <li>▪ Is it possible to identify the problem right now?</li> </ul>
PROBLEM	Usually contain the word “problem” or “concern” and ask the client to state or describe the problem.	<ul style="list-style-type: none"> <li>▪ What are your immediate concerns about cost reduction?</li> <li>▪ How would you describe the problem?</li> <li>▪ What are your immediate needs?</li> <li>▪ Is the problem turnover or lack of training?</li> <li>▪ What problems are you having with your current strategy?</li> </ul>
IMPLICATION	Asks the client to connect the current problem with others that have or may occur if the problem persists.	<ul style="list-style-type: none"> <li>▪ If you reduce the headcount this year how will that effect morale?</li> <li>▪ By replacing this system, how will you lower turnover and increase productivity?</li> <li>▪ Buy how much will the restructuring lower costs and improve earning per share?</li> <li>▪ Will a new inventory management system change people’s roles and how will that impact the union contract?</li> </ul>
NEED-PAYOFF	Asks the client if a specific feature, product, service or approach would be helpful in solving the problem.	<ul style="list-style-type: none"> <li>▪ What would be the benefit of taking this approach?</li> <li>▪ Do you think you would need to add your own people to our resources?</li> <li>▪ If you could call up a screen with this feature, how would it help you?</li> <li>▪ If we could start this month, would that help you with your budget?</li> </ul>

(Adapted from: SPIN Selling by Neil Rackham, 1988)

## **The Practice of Professional Consulting**

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**Problem Reframing.** A question strategy in combination with good active listening skills enables the consultant to perform a most important task during the business development stage: reframing the client's problem. For many reasons (see "first meeting dynamics" in the next chapter) clients may not tell you exactly what their needs are or the precise nature of the problems that needs solving. Problem reframing is a process of asking questions, testing assumptions, and suggesting different ways to describe the problem in order to get closer and closer to the true problem. For example, in an executive coaching session a client kept referring to his problem as the way his boss managed the senior team. After exploring many facets of the situation and thinking out loud with the client of other aspects that may be causing his difficulty in his role, it became clear that it was not his boss but the coachee-client who was not taking enough initiative to craft and communicate clear direction for his own immediate team. By testing facts and assumptions, asking lots of situation, problem and (especially) implication questions, and searching for alternative cause-effect relationships, the client reframed his own versions of the problem, seeing his personal communications style as the actual problem. Subsequently, he admitted that the truer problem was his inability to decide on his own strategic direction for his area of responsibility. So, rather than helping him be more effective working up, the coaching focused on the reframed problem of working *down* in his organization. Problem reframing is essential to clarifying the real problem from assumed ones and to deciding therefore what the proposal should focus on.

## **CONCLUSION**

The concepts and skills described in this chapter increase the probability the consultant will effectively engage the mind of the client by using active listening, choosing questions carefully and preparing a SPIN question strategy to conduct needs assessment. In the next chapter, we continue exploring developing business and the designing role by examining key aspects of how to make a good first impression, the dynamics and impact of emotions, managing expectations, and proposal presentation. These are important because in the beginning the client and consultant are assessing their "fit" and "chemistry" to see if they can work together. For such things can make or break a business opportunity.