How to Succeed in Consulting Without Really Trying
Definitions

**Consulting**
Engaged in the business of giving expert advice to people working in a professional or technical field

**Consultant**
Programmer, Developer, Statistician, Data Scientist, Data Analyst, Data Wrangler, Report Developer, Visualizationer

**Client**
Internal (same company as you) or External
Accepts a number in register AX; subtracts 32 if it is in the range, otherwise leaves it unchanged.

```
SUB32 PROC
    CMP AX,97 ; compare AX to 97
    JG DONE ; if greater, jump
    SUB AX,32 ; subtract 32 from AX
DONE: RET
    ; return to main
SUB32 ENDP ; procedure ends
```
What We’ll See

Client Involvement vs Level of Difficulty

- Manage the Client
- Change Control
- Manage Expectations
- Know Personality
- Report on Status
- Estimate Work Well
Scenario #1
Everything’s going fine

- Boss asks you to create something
- Boss asks how it’s going
- You say, “Everything is going fine”
- Finally, asks to see it
- Not done yet
- Not what was wanted
Everything’s going fine – or is it?

Uncertainty

What

Whether

When
How To Make Sure It’s Fine

- Client Involvement
  - Manage the Client
    - Manage Expectations
  - Know Personality
    - Report on Status
  - Estimate Work Well

- Level of Difficulty
  - Change Control
Manage Expectations

WHAT?

Solution

Problem

Can deliver

They need

WHEN?

Ask the questions
Agree in writing
Estimate Work

• What is the level of effort required for a task
• Breaking down tasks into subtasks (Work Breakdown Structure)
• Use checklists and templates

<table>
<thead>
<tr>
<th>Data Conversion</th>
<th>Project Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deployment</td>
<td>Security</td>
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<tr>
<td>Deployment Follow-up</td>
<td>Technical Documentation</td>
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<tr>
<td>Help System</td>
<td>Test Data Creation</td>
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<tr>
<td>Meetings</td>
<td>User Documentation</td>
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<tr>
<td>Performance Tuning</td>
<td>User Training</td>
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• Quantify the progress
Report on Status

• Report without them asking
• Use the estimates you started with
• Be quantitative
  – Activities Complete: This measure compares actual progress against planned in terms of the number or percentage of completed activities.
  – Work Units Complete: This measure compares actual progress against planned in terms of the number or percentage of completed product units.
• and qualitative
  – Easy? Hard?
  – Concerns? Obstacles?
What to Do if Behind

1. Understand Why
2. Present options; let the client decide
3. Change the target date
4. Consider reducing scope
What NOT to Do if Behind

- Don’t cut estimates
- Don’t assume things will get better
- Don’t just add people
Personality Types

- Popular Sanguine
- Powerful Choleric
- Perfect Melancholy
- Peaceful Phlegmatic
Popular Sanguines

- **S**: Optimism
  - Colorful creativity, cheering up others

- **W**: Disorganized
  - Talk too much, not serious, naive

- **R**: Loud Volume
  - Constant talking, bright eyes

- **L**: Excite, Inspire
  - Charm, forgetful, poor follow-through
Powerful Choleric

S  TAKE CHARGE
   anything instantly; quick, correct judgments

W  BOSSY
   insensitive, impatient, unwilling to delegate

R  FAST-MOVING
   self-confident, restless, overpowering 'tude

L  QUICK SENSE
   of what will work, sincere belief in ability
Perfect Melancholies

<table>
<thead>
<tr>
<th>S</th>
<th>ORGANIZE WELL</th>
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<tbody>
<tr>
<td></td>
<td>set long range goals, high standards, analyze deeply</td>
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<table>
<thead>
<tr>
<th>W</th>
<th>EASILY DEPRESSED</th>
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<tr>
<td></td>
<td>over preparation, negatives, suspicious</td>
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<table>
<thead>
<tr>
<th>R</th>
<th>SERIOUS &amp; SENSITIVE</th>
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<tbody>
<tr>
<td></td>
<td>well-mannered, self-deprecating, well-groomed</td>
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<table>
<thead>
<tr>
<th>L</th>
<th>SENSITIVE TO FEELINGS</th>
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<tr>
<td></td>
<td>deep creativity, want quality, organize well</td>
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Peaceful Phlegmatics

- **S**: Balance
  - Even disposition, dry humor, pleasing

- **W**: Indecisive
  - Lack enthusiasm, energy

- **R**: Calm Approach
  - Relaxed posture

- **L**: Calm, Cool, Collected
  - Not impulsive, well-liked, not brilliant new ideas
When a ... talks to a ...

- Powerful Choleric
- Popular Sanguine
- Perfect Melancholy
- Peaceful Phlegmatics
When a … talks to a …

- Powerful Choleric: Stick to the bottom line
- Perfect Melancholy: Sensitive to schedule and interest
- Popular Sanguine: Be positive and encouraging
- Peaceful Phlegmatics

When a … talks to a …

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When a ... talks to a ...

- Powerful Choleric
- Popular Sanguine
- Be interested and sensitive
- Be patient and listen well
- Allow time to share thoughts and ideas
- Perfect Melancholy
- Peaceful Phlegmatic
When a … talks to a …

Powerful Choleric

Stick to the bottom line

Compliment

Freely offer praise

Popular Sanguine

Perfect Melancholy

Peaceful Phlegmatics
When a … talks to a …

- Powerful Choleric: Speak more quickly
- Perfect Melancholy: Facts backed with documentation
- Popular Sanguine: Get excited about good ideas
- Peaceful Phlegmatic:
How To Make Sure It’s Fine

Client Involvement

Level of Difficulty

Manage the Client

Change Control

Manage Expectations

Know Personality

Report on Status

Estimate Work Well
Scenario #2
Better without clients

- Client asks you to build something crazy
- It will be expensive but you don’t want to say ‘No’
- Success depends on client doing something by a particular time
- That time comes and goes
- The client finally asks why it’s late, why it costs so much and why it doesn’t work
What went wrong?

✓ Didn’t give them the information they needed
✓ Didn’t manage them
✓ Didn’t stick to your guns
Working With Clients

<table>
<thead>
<tr>
<th>Level of Difficulty</th>
<th>Client Involvement</th>
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<tbody>
<tr>
<td>Manage Expectations</td>
<td>Manage the Client</td>
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Crazy Is as Crazy Does

Ask for something crazy

Why?

Answer?

Yes

Still Crazy?

No

Yes. Here’s how much it will cost.

Yes.

Still Crazy?

No

Yes

Yes. HERE’s how much it will cost.

Yes.

Still Crazy?

No

Yes

Yes. Here’s how much it will cost.

Yes.

Still Crazy?

No

Yes

Yes. HERE’s how much it will cost.

Yes.

Still Crazy?

No

Yes

Yes. Here’s how much it will cost.

Yes.
Managing the Client
Managing the Client

• Communicate expectations
  – Be clear about dependencies
  – Lead or coach the client

You can make buffalo go anywhere, just as long as they want to go there

You can keep buffalo out of anywhere, just so long as they don’t want to go there
Change Control

Set the baseline

Document agreement

Document deviations

Analyze impact

Determine options

Present to client with impact

Let the client decide

Schedule

Budget

Scope

Quality
Status Reporting

Audience
- Not just the one person you’re in regular contact with
- All stakeholders
- CYA and Sales

The (Ugly) Truth
- Dependencies
- Risks
- Issues
- Decisions
Working With Clients

- Change Control
- Manage Expectations
- Know Personality
- Estimate Work Well

Client Involvement vs. Level of Difficulty

Manage the Client

Report on Status

Level of Difficulty
Be A Better Consultant

Client Involvement

Level of Difficulty

- Manage the Client
- Change Control
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Resources

- *Software Time Estimation: Are We There Yet?*, Jack Fuller, Experis, MWSUG 2011
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