

Paper 124-31

## **Care and Feeding of Your SAS® Consultant – And Don't Bite the Hand that Feeds You: Two Views on Consulting and Consultants**

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### **ABSTRACT**

As consultants, we should be constantly trying to work ourselves out of a job. Unfortunately, it doesn't always work out this way. Sometimes, our clients are stuck with a costly resource, a project that is never finished, and one that never quite meets their requirements. As clients, we want to be sure that when we engage a consultant we get the type of expertise we need and that we can (amicably) get rid of the consultant. In this paper, we will discuss both roles - consultant and client - and suggest ways to keep the relationship gourmet and not a food fight.

### **INTRODUCTION**

The client/consultant relationship should be approached as a partnership where both sides come out ahead at the end of the project. Sadly, it is often viewed as a necessary evil ("We have to hire another @##@%% consultant again?") or an opportunity for a cash grab ("Yippee, I can really bump my rates for this one"). In this paper, we discuss ways to help ensure that both the client and the consultant win. Let us start by looking at the relationship from the client's perspective.

### **THE CLIENT'S POINT OF VIEW**

When selecting a consultant it is important to have a clear idea of what your priorities are. The most obvious competing priorities are budget, timeline, and the demands of the project itself. Yet from those surveyed, the number one recurring quality sought by clients was that the consultant be a good fit and work well with the other employees. Given these quantitative and qualitative attributes, how do you go about maximizing your rate of return in all areas?

### **DEFINING YOUR OBJECTIVES**

The first step after deciding to hire a consultant is to define your objectives. Clear objectives help you to choose the right consultant by matching his or her qualifications with the desired result. Why are you hiring a SAS consultant? Is it because you do not have the expertise in house? Is it to have someone with an unbiased perspective give an objective critique of the current system in place? Is it to have the consultant develop the program for a new and specific project? Once you have a good understanding of what you want to accomplish, you are in a better position to interview potential consultants.

## SOURCES OF CANDIDATES

Your best source of candidates is the group you have already worked with or those whose work you have seen and liked at conferences. The next best source is referrals from friends and colleagues whose opinion you trust. You may also rely on recommendations from other consultants who suggest someone better suited for your current project. Don't forget SUGI proceedings, which can be searched by using the key word "consultant" or by your project topic.

Lastly, although you may be starting with a longer or more general list, trade magazines and consulting firms are another good source for finding candidates. This has the advantage of allowing you to view each candidate without someone else's opinions influencing your choice, but has the disadvantage of only having someone's résumé or work proposal on which to base your decision. This is not the best way to select a consultant and you should be wary of the fancy résumé. A strong writer can gloss over his/her weaker technical qualifications while a highly competent programmer may lack the finesse to sell him/herself on paper.

Do not be blinded by a 'paper trail' either. Education and certifications are important but should not be used exclusively when screening consultants. Remember, you are looking for more than demonstrated expertise; you are looking for a partner. Although certifications in particular tell you that the consultant has met some standard, many bright consultants do not bother with certifications; a review of SUGI presenters will attest to that. Of course, if you have no other way to discern the technical competency of two candidates, then certifications can be a deciding factor. Assuming you have found a consultant who meets the technical requirements, then you need to look at the fit of the consultant to the company.

## INTERVIEWING

Narrow your list of candidates to three or four by screening them over the phone. Ask about their experience and projects that they worked on that are similar to yours. This is also a good time to ask about their fees. If they are so high that there is no way you could afford to hire him/her, then you have saved everybody's time.

The process of hiring a consultant is every bit as important as hiring a permanent employee. Don't take short cuts on the interviews. They are your best opportunity to learn about the candidates' capabilities and to get a feel for whether the person is going to fit into your organization or not.

Be careful of firms that send their senior people to do the bidding and presenting, but will send their junior employees to do the work. If part of your project requirements includes presentations to senior executives in your firm, then this may be unacceptable.

One or two key employees who will be working most closely with the consultant should be involved in the interview process at some level. This may entail preparing the questions or a technical test, being available to the interviewee for questions about the project, or being one of the interviewers. They are the ones who understand the intricacies of the project and who have to get along with the consultant during the work term. Including them in the hiring process will alleviate perceived threats about an "outsider" entering the company. This does not mean the final decision is theirs to make – it is essential to be clear that their role is to provide input. Their contributions can be invaluable for hiring the consultant with the right skills for the project, and there will be a greater likelihood of smooth employee-consultant relationships down the road.

## CHECKING REFERENCES

Once you have made your decision it is imperative that you check references if you have not worked with the consultant before. Try to find references other than those provided by asking other friends or clients who have experience with him/her. This way you are not hearing only from those who have been pleased with the consultant's work.

## NEGOTIATING FEES

There are three ways a consultant sets fees.

- Hourly or daily rate: The advantage is that you only pay for time worked. The disadvantages are that it can translate into inefficient use of time by the consultant and you may not know the total cost of the project if the timeframe is uncertain.
- Retainer (you pay a regular monthly fee): The advantages can be a reduced rate and the agreement that the consultant is always available.
- Project fee (an amount is agreed upon ahead of time): This is advantageous in that you know what your costs are at the beginning of the project, even if it means paying a bit more than what you may have paid under a timed-rate agreement. The contract should specify any additional expenses that are permissible outside of the fixed fee.

## DRAWING UP THE CONTRACT

Although it is essential to have a written and signed contract, the contract need not be complex. The consultant's written proposal can be the starting point for discussing the terms and fees, or you can write a letter of agreement on your own. Regardless, the contract should, at a minimum, specify:

- the start and end of the contract
- the scope of the project and the steps needed to accomplish it
- the end result and who has ownership over it
- how will the success of the project be measured and how will you know it is finished
- the project fees and how they are to be paid, including what out-of-pocket expenses will be covered
- how disputes will be resolved
- a confidentiality clause if the consultant is dealing with sensitive information
- who will be working on the project (both your own staff and the consultant's staff) and who will be supervising the consultant
- the status of the project that is left behind (i.e., fully working system, recommendations and outline only, etc.) and whether the consultant has any follow up responsibilities

## FINDING THE QUALITATIVE FIT

You may have followed all of the right steps to hire a consultant, but as mentioned at the beginning of the paper, that person still has to fit in and be accepted by the other employees of the company. Here are some of the more noted qualities that are appreciated in a consultant.

A consultant must be flexible. S/he should be able to adapt to the task, the work environment of the company, and most importantly, the people with whom s/he is directly working. A good consultant will ask for feedback along the way to ensure the progress is matching the needs of the client ("Am I missing any critical issues?"), and will be open to alternate views of how to get things done.

Other attributes that are the backbone of a good consultant:

- Confirmation of receipt of email and a timeframe of when the question will be answered if it is not going to be dealt with immediately.
- Accessibility of the consultant. It should be known before the consultant starts how much time s/he can expend each week on the project if the person is not working in-house on a full-time basis.
- Patience in training.
- Not afraid to express an opinion, even if it is contrary to the client's, but understands it is ultimately the client's decision.
- Ability to learn the capabilities and tasks of the employees and delegate when possible.

A contract can last several months, or even years, and if the working environment is not cohesive, then time will be wasted (employees not helping the consultant), morale will be low, and the intermediate steps as well as the end project can be resisted. Therefore, a client should always have in the back of his/her mind the need to realize that the consultant is not fulfilling expectations and to pull out. At some point it is time to listen to the old economics adage of, "Don't throw good money after bad" and to cut one's losses. It is better to lose a few weeks' worth of time and expenses than to continue down the same path for several more months. This does not just apply to the technical side of the job, but to the personality fit as well. Sometimes finding the right match between client and consultant can be a bit like rolling the dice, but assuming that a good match is made, the consultant should interact with the client throughout the project, grooming the client to take over in the future.

## THE OTHER SIDE OF THE COIN

Now that we have looked at the client's perspective, let's see the picture from the consultant's side.

Being a consultant can be fun and rewarding (at least if you are successful) but being a consultant can also be frustrating and stressful – even if you are successful. There have been papers at SUGI on some of the steps you need to take before actually hanging out your shingle, so we will not address them in this paper. Rather we will focus on some of the things you need to do to make your practice fun and rewarding.

There are no silver bullets or magic wands out there. There is no 7 or 12 or 39 step programme that will lead you to success. We think, however, that there are some things you need to do to keep the fun and rewarding part the largest part of your practice: be honest, be bold, and be yourself. This sounds simple enough, but what does it mean? Let's look at some examples.

## BE HONEST

This is more than just telling the truth; it is about being honest about yourself, with yourself and with your clients. Let's start by looking at being honest with yourself.

When you are presented with an opportunity, be honest with yourself about how well the opportunity fits with your goals and interests. Ask yourself "Do I really want to do that work?" If a client offers you an opportunity, it is usually because they want YOU. If you do not really want to do the work then there is a good chance it will show, and the 'you' that was offered the opportunity will not be the 'you' that shows up. Over time, a lack of enthusiasm will tend to result in a lowering of the quality of your work; if the quality of your work deteriorates, so will your value to the client and ultimately to yourself.

Of course there may be instances where you have to take on projects that are not really of interest; after all, most of us have developed a certain dependency on food and shelter. If you must take on a project out of need, you should try to negotiate a limit on your contractual commitment to as short a time as possible.

You have to take stock of your strengths and weaknesses and know your likes and dislikes. This will help you to be selective and avoid the pitfall of attempting to be all things to all people. Don't lose sight of what motivated you to be a consultant in the first place.

With an honest inventory of your consultancy skills, work to develop areas of expertise that complement and enhance you, that 'fit you like a glove'. Sometimes this can be in a particular industry or perhaps a cross industry focus. And as you search out new contracts, make sure they fit and further your goals, and not just pay the bills.

We must also be honest with our clients. Sometimes we are faced with taking on projects we do not want because our 'best' client has asked us to. This can be a tricky situation. Be honest with the client. Let her know you don't think you are the best person for project – after all, if you are not interested you really are not the best person. Before you turn down the project you must also remember how hard you worked to cultivate a relationship of trust with your client. Do you want to risk losing a good client because you are not interested in one of his projects?

As you approach an interview for a new opportunity, remember the interview process should be a two way street. Just as the client is assessing you for your skills and fit, you must also assess the opportunity in terms of your goals. You want more out of the contract than just a cheque; you want to ensure you are moving forward on your agenda.

Your own agenda has to be credible in the eyes of the client. Sometimes no matter how much you want to further yourself, you have to be honest when you may not be the expert the client is looking for. Rather than presenting yourself as the expert, be honest; but don't abandon the opportunity. Showcase your strengths and how they mesh with the client's needs. Acknowledge the gaps in your skill set and discuss how you can remedy them.

Beyond knowing your interests, you need to be honest with yourself about both your strengths and your weaknesses. Attending conferences such as SUGI and SESUG can be a great means of evaluating your knowledge and skills. Don't be surprised if you discover you know less about some of what you thought were your strengths, but more about things you did not think you knew.

## **BE BOLD**

Don't be afraid to push the envelope. If you see an opportunity a little out of your normal scope but within what you feel is your capability, go for it. Lay out why you know you can handle the project and if you have any deficiencies, perceived or real, a plan on how you will fill those gaps. This boldness should apply not only to new opportunities, but also to projects you are currently working on. Look for areas where you can add value both to yourself in terms of expanded capabilities and to the client. Sometimes this might be within the confines of an existing project – work that can be done as part of a project plan – but also be on the lookout for new opportunities with the client organization. When your current project is complete, put in a proposal for the new project.

Push beyond the envelope of your own skills and environment. Sometimes this means extending your own knowledge in your area of expertise. Many times it means learning how to apply your knowledge across industries or lines of business. Being very good in a very small area can mean being very out of work after some upheaval in your area.

Forget the old Star Trek adage "To boldly go where no one has gone before" and instead remember the other adage "Two heads are better than one". Look for ways you can partner with other consultants. Many times a client needs more than one consultant, or needs a mix of skills that no one consultant can offer. And of course there are probably no better places to meet such consultants than at SUGI.

## **BE YOURSELF**

People who choose to be consultants are often cut from a different cloth than those who choose to be full time employees. Recognize that and do not try to look like an employee to a potential client. The client is not looking for another employee, the client is looking for a consultant; don't be a square peg trying to force yourself into a round hole. A good client will value your difference.

When you operate as an independent consultant you are often engaged because of who you are – both your technical expertise and your personal style. When you meet potential clients be yourself, not who you think they want. Of course there will be times you have to hide your naturally sparkling personality under a cloak, but only mushrooms thrive in the dark.

Focus on your strengths. Or put another way, get help for those things that are not your strengths. If you are not a heart surgeon don't attempt open-heart surgery on your own ticker; if you are not a financial management expert don't attempt to manage your finances. If you've never written a web page before, then hire someone to write yours. Get help doing the things you do not do well and use your time doing what you do best – and what earns you money.

Enjoy yourself. Have some fun. Last time I checked, most of us only have one life; don't be afraid to live it. Take your vacations; spend time with your friends and family. If you are as good as you think you are, your clients will still be there when you come back.

Finally, you cannot be yourself if you cannot afford to be. Pay yourself modestly, while building a solid cash cushion for the leaner times. Knowing that there will be a roof over your head and food on your table makes it much easier to be honest with yourself and only take on the types of projects you want. Being able to afford to attend conferences and training courses allows you to be bold in the pursuit of your goals. And when you come back from your holiday, you will still be yourself, ready to leap tall buildings in a single bound.

## **CONCLUSION**

Whether you're the client or the consultant, you want to enter and leave the relationship harmoniously. Communication is supposed to be the backbone of a strong relationship and it is no different between client and consultant. If both parties are open and direct from the interview to the sign-off, there is more assurance of a satisfying experience and less chance of ending up with indigestion.

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