

# Develop the Contracting Muscle

By Danielle Taylor

Consulting projects have recognized cycles they must pass through on their way to completion. The most important one is the contracting phase. This phase sets the tone for the duration of the project and can determine the project's success or failure. Internal Consultants (ICs) new to the field have a tendency to overlook this phase and may find themselves adrift in a sea of miscommunication, politicking, power plays, and angst. The best way to avoid this is through well-developed contracting skills.

The contract, or service level agreement, is a written document that outlines the agreements reached between the client and consultant with regard to the scope and direction of the project. It need not be complicated. The goal is to define and describe the services, the parties involved, the timeline, and the results.

## Why Contract?

Contracting is time consuming, but the payoff will be well worth the investment. One of the most powerful tools in the IC's toolkit is the contract. More than just a summary of financial arrangements, the contract serves as a map for both the internal client and IC. Contracting provides an opportunity to educate the client, focus the scope of the project, and establish a benchmark. None of these should be taken lightly, yet too often the contracting phase is abbreviated or eliminated altogether due to time constraints, pressure from clients and/or supervisors, or due to underdeveloped contracting skills.

## Educate the Client

Drafting a contract will provide the IC with an opportunity to educate the client about appropriate methods for achieving the results desired. Many clients come to the ICs self-diagnosed. They treat the IC like a pharmacist and

look for them to "fill the prescription" with a training event. Some ICs succumb to the pressure to deliver the requested intervention despite knowing that training is not the answer. Their contracting muscle is underdeveloped. Navigating the politics and pressures of working internally presents special challenges to the IC. Externals have the advantage of disengaging with a client that is "not ready" to work with them. Externals also have the benefit of being outside of the organization and therefore free of its politics. They can call it as they see it with limited repercussions to their tenure as a consultant. The IC, therefore, requires special finesse to manage relationships. For the IC to smoothly navigate expressed wants and actual needs, he or she can use the contracting phase to educate the client.

## Focus the Scope

Let's use the example of the client who wants "training" to solve a current issue in the department. Further discussion reveals there are additional issues that need as much, if not more, attention than the issue that prompted the call in the first place. A contract meeting allows the consultant the opportunity to focus the client and prioritize needs. The contract itself is a tangible record of what both parties agreed the project would encompass. It is a road map that lets everyone know when they have "arrived."

As Americans, we are a low-context society. We like to leave little, if anything, to chance. A contract will help limit the chance that the service provided by the IC is incongruous with the needs and expectations of the client.

The contract is also an opportunity for the IC to check their understanding of the scope and nature of the project. It will help you identify all the clients for the project beyond the contact person. Remember, the IC is a servant

with many masters. This fact of life must not be taken for granted. During the contracting phase the IC and the client should establish who is setting the objectives, making decisions, and receiving any reports. In addition, there is always an internal's first client: their immediate supervisor.

## Establish a Benchmark

"If you don't know where you're going, how will you know when you get there?" This adage certainly applies to consulting projects. ICs should use contracts to specify results. A contract drafted at the inception of a project will ease the evaluation of its outcomes at the end. If drafted properly, the final report for the project should mirror the contract in the end.

Outcomes can be measured against benchmarks established in the contract. In that way both client and consultant will know if and when they have "arrived." The final report will be able to refer to the contract when explaining the whys and hows of the project.

## How Do You Contract?

The contracting phase has several steps: the meeting, the proposal, and the confirmation. The contract meeting is where the client and the consultant negotiate the services to be rendered, the responsibilities of each, and establish a timeframe for the project. During this meeting roles should be defined, objectives determined, and project management clarified. The proposal is a consequence of the meeting. This written document should capture its spirit. Included in the proposal should be:

- Assumptions
- Theory and research (as needed)
- Goals and objectives of the project
- Delineation of roles and responsibilities

*continued on page 6*

# HAVE YOU BEEN TRAINING TOO LONG?

By Theresa Hummel-Krallinger

At last year's raucous holiday party our Chapter President and Resident Comedienne Theresa Hummel-Krallinger shared with us this test to determine whether or not we've been training too long. Take it and see how YOU score.

If you look in the mirror and see colorful dots on your nose after buying a new pack of Mr. Sketch Markers...

You've probably been training too long.

If after a deep family discussion, you create breakout groups---and ask them to come back in 10 minutes for a debrief...

You've probably been training too long.

If you have a 3M Post-it flipchart pad in the trunk of your car...

You've probably been training too long.

If you write learning objectives for your kids before leaving on a family vacation...

You've probably been training too long.

If instead of a timeout you give your kids a 15-minute break...

You've probably been training too long.

If your favorite catalog is from Oriental Trading Company...

You've probably been training too long.

If someone mentions the Mager six pack, and you know it's not an alcoholic beverage...

You've probably been training too long.

If before your kids can open gifts on Christmas morning, your force the entire family to go through an icebreaker exercise to kick off the event...

You've probably been training too long.

If you bring a koosh ball to networking events...just in case...

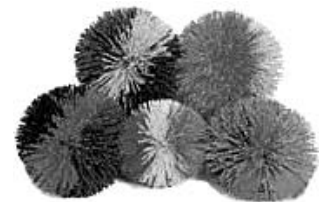
You've probably been training too long.

If you set up name tents at family dinners and encourage guests to customize it to display their individuality.

You've probably been training too long.

If you ask your partner to complete an evaluation form after lovemaking (name not required)...

You've probably been training too long!



## DEVELOP THE CONTRACTING MUSCLE *continued from page 5*

- Ways in which the service will be delivered
- Ways in which performance will be evaluated
- Period of time the contract will cover
- Fees and cost schedule where applicable

When the proposal is submitted it should be understood by all involved that it is a draft document that may require additional discussion and revision prior to moving to the final step: confirmation. Precisely because of

interim discussion and negotiation, there needs to be a confirmation of the final proposal draft. This ensures that all parties are in agreement to the most recent evolution of the project. It is incumbent upon both parties to read the final draft carefully. When the contract is designed to communicate the steps involved in a project, strict enforcement is possible.

The contract, like any map, still has a margin of error. The geographical landscape may change, governing bodies may change the rules, or funding may be redirected to other projects.

Internal Consultants who develop and "exercise" their consulting muscle are better able to navigate these obstacles. Diligent preparation and planning at the inception of a project will bear sweeter fruit at the end.

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## BUILDING A BETTER CHAPTER



Just because it's summer doesn't mean that Chapter business is on hold. The leadership team is committed to making our Chapter among the best in the country. One of the integral components of this effort is called Leadership in Action (LIA), an experiential learning program. Leaders meet every six weeks to share knowledge and learn from each other while applying their learning to individual and team performance in their Chapter positions.

The most recent LIA program was focused on how to make the leadership team (and the chapter) even more effective. On Saturday morning, July 26th, twelve dedicated leaders met in Conshohocken...and we even have pictures to prove it! The morning was spent reviewing data from a recent self-assessment completed by the leadership team. After three hours of productive discussion, the team left with four high-level action items to be addressed over the next several months. The next LIA



meeting, scheduled for September, will be a virtual meeting to revisit the Chapter's vision, mission and values. In October the leadership team will meet in person to discuss the Chapter's business plan.

Our leaders are also exploring other ways to make sure the Chapter is meeting your needs. The Board meets every quarter and the Executive Committee (made up of the President, Past-President and

President-Elect) meets biweekly to review what is going on in the chapter and to make sure that issues that arise are being addressed. The Membership, Programming, Communication, Finance and Delaware Satellite teams meet regularly to ensure the chapter offers quality programs and services. The most exciting new initiative involves revamping our website to make it more interactive...so look for lots of new improvements in the chapter—online and in person—in the months to come.

