==

Client Satisfaction Can Be the Measure of Success for Consultants

By Lin Grensing-Pophal, SPHR, *March 2008*

Because large consulting organizations invest a significant amount of time and effort in measuring client satisfaction, it is likely that it takes more than a gut feeling or a collection of anecdotes to produce enough information to evaluate how satisfied the client is with the service provided.

Lynda McDermott, president of EquiPro International Ltd., a New York-based human resources and development consulting firm, uses several measurements to evaluate whether her clients are satisfied or—preferably—delighted. A "delighted client" will continue working with a consultant and refer the consultant to others, she says. Repeat business is a sure sign the client is satisfied, and "that is the best evaluation metric," she says.

Edward Muzio, president and CEO of Group Harmonics Inc., a consulting firm specializing in the use of analytical approaches, agrees, but with a slightly different perspective. Client utilization of the service provided by a consultant is a key metric when assessing client satisfaction, he says. A consultant needs to know if the client is implementing what was provided, and if a consultant taught an executive a new approach to hiring, that consultant should be able to talk with the client a month later and find out if the program provided is being used, he said. If the client is using the program, that is a pretty good success indicator, Muzio adds.

In addition to assessing satisfaction through retention and implementation of recommendations, consultants often turn to more formal assessments of satisfaction. There are no set assessment tools, and the assessments used can vary widely, but they might include:

- Direct requests for client feedback during a program.

- On-the-spot evaluation forms after a program.

- Follow-up surveys within 90 days of completion of a contract to assess longer-term impact.

Susan Steinbrecher, a training and development expert and co-author of *Heart-Centered Leadership* (Black Pants Publishing, 2003) uses a similar approach. When the consultancy provides a client with coaching services, there are a number of assessments that enable the consultant to determine if the client has received a return on investment, she says. Those assessments include:

- Pre- and post-coaching survey for the client.

- Post-survey for the client's supervisor/manager to complete.

• At least two meetings with the manager, client and coach to obtain feedback on how the process is going and whether goals are being met.

• Post-employee feedback on their manager.

In addition to providing assessment surveys at various points in the engagement, consultants may consider using a series of questions to assess client satisfaction once the engagement is complete:

• What were the major outcomes of working with the consultant?

• What did you particularly value about the working relationship with the consultancy?

• Were there any challenges or problems in working with the consultancy?

• What recommendations do you have for the consultancy staff to improve working with clients?

• What other challenges do you/your team/your organization face now and in the next six months?

• What additional support/interventions to you think might be useful for you?

• Who else in your organization do you think might benefit by working with the consultancy?

In addition, consultants need to be aware that there are different measures for different services, Steinbrecher says. For example, training classes need an analysis at the outset to ensure that the organizations' critical needs will be addressed, she said. Once training is complete, an evaluation is done to confirm that it was effective.

Online Assessments

Technology makes it relatively easy and inexpensive to gather feedback from clients, say Sean and Mary Ann O'Neil of One to One Leadership in Pelham, N.Y. The O'Neils use online surveys such as "SurveyMonkey" and "Zoomerang" to gather baseline information before a project begins, as well as to measure the impact of the services provided and client satisfaction.

Not only do these types of assessments provide important information for HR consultants that can help them adjust and modify services to better suit a client, but the process of asking for feedback also sends a strong, positive message to a client.

Bob Kustka spent more than 20 years working as an HR executive for the Gillette Co. before starting his own firm, Fusion Factor of Norwell, Mass. "As an HR manager, I viewed my consultants or vendors as an extension of my own services," he says. When Fusion Factor is purchasing HR services, much time is spent explaining the firm's expectations and operating principles, and that has "resulted in strong relationships with vendors who would often go above and beyond what was required," he says. However, there have been instances where vendors did not meet expectations but the relationship with the vendor was strong enough to enable constructive conversation, he says. Focusing on building relationships with consultants has resulted in only a few situations where the relationship had to be terminated, he adds.

Conversely, once Kustka started consulting, he found that the best way to start a job is to write explicit proposals outlining the deliverables. "I also regularly ask my clients during the process whether they are satisfied with the progress [of the program]," he says.

In addition, checking in with the client as the program proceeds is critical, says Ann Latham, president of Uncommon Clarity Inc., in Easthampton, Mass. Consultants who wait to discuss with the client how well the work is going are waiting too long, she says. Consultants need to take actions that increase the likelihood of a favorable outcome, she said. Such actions include:

- Agreeing up front, and in writing, how success will be measured.

- Frequent meetings with the client to ensure a shared understanding of progress and to discuss necessary adjustments within the agreement.

- Careful prevention of scope creep via clear and frank discussions to differentiate original and new objectives.

While seeking feedback is good, it can be overdone, Muzio says. "We'd love to do formal before-and-after assessments, but we have to be sensitive to client workload," he says. "Our engagement must be on their terms; we've found that adding that kind of request makes us less popular," he says.

Instead, Muzio prefers interaction. HR consulting is, after all, a relationship business. "You have to know why you're there and what you're trying to accomplish. Then, whether you're measuring progress along the way, or after the fact, there's no substitute for human conversation," he says.

Lin Grensing-Pophal, SPHR, is a Wisconsin-based business journalist with HR consulting experience in employee communication, training and management issues. She is the author of Human Resource Essentials: Your Guide to Starting and Running the HR Function *(SHRM, 2002).*