



R E C O U R S E S

POSITION STATEMENT

Doing More Effective Work: Separating the Consultative from the Transactional

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INTRODUCTION

For the purpose of this reminder, I'm going to assume that you are smart and that you do your homework, and that the only thing keeping you from doing more effective work for clients is that they don't listen to you enough. Got it? If both of those first two things aren't true, these suggestions aren't going to help much.

I want to talk about this because doing effective work for clients and making good money in the process keeps you interested. For instance, just making money isn't enough—it gets boring and it feels empty. You need to really be making a difference on behalf of your clients or this is going to get old.

So assuming you are smart and diligent, how do you get clients to listen more? Here are five very specific suggestions to turn things around a bit.

FIRST SUGGESTION

First, make sure that within any given client relationship the same person is not doing what we call Interfacing and Planning (these two words come from our Functional Model, and the first simply refers to the role of an account executive, whether they are called that or not, and the second refers to account planning or account leadership). Stated differently, clients will not listen well to strategic guidance if it comes from the same person managing the daily account activity. It's not about ability, either, but about wanting the deeper advice to come from someone a bit more "apart" from the daily routine than their frequent contact at the agency. We want our pilots (Planners) in uniform and "apart" from our gate agents (Interfacers). Let your Interfacers excel at that work, and whether they're good at it or not, don't expect them to be effective Planners (provide strategic guidance) to those same accounts because being a daily contact will move you to another role.

SECOND SUGGESTION

Second (but closely related), make sure that marketing, planning, strategic leadership—whatever you call it—is actually a separate position at your firm. That means title, job description, available tools, etc. If your firm is too small to require a full-time person dedicated to just that (less than 16 employees), be careful what you have that person doing in the time they have left. Sometimes you can effectively combine it with new business development, and sometimes you just have that person working part-time.

THIRD SUGGESTION

Third, don't give away your best thinking when pitching an account. The message there is that you don't value it since money is the currency of respect. Using that mantra, what you are really valuing is your implementation work if you get the account. That's like a portrait photographer charging a \$50 sitting fee to make sure someone shows up, and then making all the money on selling overpriced 16 x 20" prints for the mantel. So stay away from those pitches, or peel off a section of the proposed engage-

ment and get paid for your thinking with an assessment tool (otherwise known as paid prospecting), often leading to a better proposal, anyway, that's a more appropriate solution to the client's problem.

FOURTH SUGGESTION

Fourth, always list any strategic work you do separately in proposals. Clients are more likely to notice it and assign value to it. This applies to invoicing, too, which needs to list it separately.

FIFTH SUGGESTION

Fifth, make a distinction between consultative and transactional pricing by using round numbers for the former (\$40,000) and more specific-looking numbers for the latter (\$23,120). One looks more confident and the other looks like you're hiding behind a spreadsheet to justify it.

FINALLY

The common theme in these suggestions? Make sure everything about your consultative work is different from your transactional work.