TATA INTERACTIVE SYSTEMS

IMBIBING A CONSULTATIVE MINDSET

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You thought you had it all figured out when the raw content came from the client. A straightforward solution; you could wrap up in five weeks. Luckily, you have a good team too! The initial calls went off fine and the client seemed eager to wrap this up. You send the first storyboard … and it comes back shredded to pieces by the SME. Proactively, you ask for a call, confident of sorting this out. But the client is now very livid and states that TIS has not understood the requirements. You try to reason, but the client would hear none of it. They have decided that the course should be scripted and built in a specific manner. The SMEs are calling the shots now! Despite several iterations on the deliverables, discussions with the SMEs, and late nights, the project continues to go south. Before you know it, the matter is escalated to the top management.

Another day in the life for you?

Is making ALL changes, requested by the client, enough to keep the client happy? Is that even the right approach? What could we do to ensure that client's needs are understood and a product is delivered to their satisfaction? Is some debate with the client appropriate, or necessary? Or, just let it be? How do we get them to see our point of view? These questions always bother us.

Some of you might agree that barring a few cases, it might actually be possible to manage and collaborate with clients/SMEs, if we are able to gauge their needs better. This is achievable if we resist the temptation for 'fight or flight' and cultivate a mindset that enables **better engagement** with clients and **discovery of their needs**. In fact, a **consultative mindset** provides an effective path to generate positive outcomes. Again, this is not a one-approach-fits-all solution, but a general trend.

Here are few ingredients of, what consists of, a consultative mindset

1. Do Your Homework (Prep up)

Read up on the topic and the company beforehand when you talk to the client. It helps break ice with the client when they understand that you have some basic knowledge, or at least interest, in their work and culture. This will go a long way in building the initial rapport with the client, which in turn is likely to help you in selling your ideas faster.

2. Pre-set Expectations

After the kick-off formalities are done, in the first call itself, **define a structure for the calls** and emphasize the importance of communicating concerns immediately. Some clients don't need that boost of confidence, but some can be reticent and need this reassurance.

3. Probe

Ask probing questions. Don't hesitate to ask things you haven't understood: why the client might need a particular feature, jargon the client uses often, why the client is pushing against one of our design features, etc. Clients often do not know "what they do not know" and use these terminologies out of habit. In fact, they might open up more with our questions.

4. Enable a Conversation/Discussion

This one is vital. Y**ou are not a "vendor". You are the client's partner. Believe it, and let it come out in your interactions. Make it a partnership.** Take time to understand client's business: Is it a change in business model? Are they having operational problems? Is there an issue of time to competency? Paraphrase what the client tells you, without using the exact words. Weave your own perspective. This serves to clarify and communicate your point of view and helps reaffirm your understanding. Recommend and assist them in ways that are specific to their unique situation and goals.

5. What's The Big Bet?

Figure out the **end objective of the training solution**. Uncover key business problems, which client's industry is facing: dwindling customers, manufacturing losses, an impending product launch, or cultural issues. Try and steer your thoughts and recommendations to how it will help achieve the end objective. It could be launching all courses by fall or a solution which helps cut down the onboarding time of learners. This will help sell your ideas faster.

6. Provide Assurance

The client is looking for someone to understand their point of view. At this point, break from thinking how it will fit into the scope (which is definitely important) and try to understand their perspective. Only after understanding their perspective, would you be able to provide a solution that will fulfil their needs. Transform the interaction from a checklist scope fight to a broader **give-and-take discussion.** It's easier to bring things within the scope once you have addressed their concerns with assurances on alternate ways to deal with them.

7. Ratify Understanding

When you explain a concept, sometimes you intuitively feel that the client has not entirely bought into it. You will know this by the client going quiet and just staring into your presentation, sitting back thinking, trying to collect his/her thoughts, or saying "Yes"/"Ok" in a half-hearted manner. At this point, stop and **ask if they have a question or point** to make. This will help them trust you and also avoid expectation issues later on.

8. Speak Up

Shed your inhibitions. You don't have to just sit and listen. **Make your point**. And back it up with some theory or experience you are comfortable with. Make it relevant to the topic under discussion. Remember that they are wondering about how the solution turns out as much as you. So, don't worry.

9. Don't be Defensive

Never be defensive of your concepts and solution. Instead, **ask questions and discuss ideas** in detail. Walk them through your assumptions and reasoning. Chances are, you will be able to show weight in your concept. This will also show you as flexible in your approach. If you need time to process the criticism and come back with solutions after discussing it internally, ask for it confidently. Just don't do it too often or you come across as unprepared! And of course, if the client has a point, or several, concede the change gracefully. Remember, you're co-creating something: you bring the learning expertise, the client (generally) brings the business expertise.

10. Get Into Their Mind

Nope. We are not talking about hacking client's mind! **Gauge the client's thinking style**. Do they like creative, logical, or number-based explanations? Frame your response accordingly. Tactics that work: a) use analogies to everyday things b) Mock it up! Use tools available in web conferences. For instance, the Draw tool in WebEx meetings that you can doodle with.

11. Play Devil's Advocate

Challenge ideas, even if they are your own, by playing devil's advocate. You may make an argument against a position that either you or your client has taken for the sake of a debate to explore a thought further. **Think using a 'What-if'** kind of question. Propose alternative approaches that haven't been considered, if required. This way the client will feel that you are completely involved in the discussion and are thinking about a solution from a wider perspective leading the client to open up more. They will most likely end up giving solutions to the problems themselves. Very importantly, they will be assured with the thought that you are not only trying to get a closure but trying to get the solution right.

12. Seize the Moment

Learn to **quickly articulate** at the first available opportunity. It's often difficult to set the context later. Don't wait. Be prompt. Don't wait for others to speak up first.

13. Identify your Champion (or Create One)

This is important. Try and quickly identify the one person in the client's team who can help steer things in your favor. This person may either be the main stakeholder or someone whose opinion makes a difference and can influence key decision makers. Try to take this person into confidence without stepping on anyone's toes.

In the end, it boils down to finding ways to work with a client to achieve a common goal. And a consultative mindset enables you to be nimble, open, creative, persistent, and inquisitive. It cements your relationship with the client and makes you a trustworthy partner.

About the authors

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Srijit, with master's degrees in Business Management and Sociology, has over 13 years' experience in designing and building complex simulations and productivity tools. As the Vice President with Tata Interactive Systems, Srijit used to head the Simulations Center of Excellence and is currently an integral part of Team DNA.

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DNA is the Design and Innovation arm of TIS

This team is responsible for problem solving through design thinking and studying the impact of emerging trends such as gamification, augmented reality, and virtual reality on learning.