Consultants and Contingency Plans

Idea In Short

Protect current engagements first, overcommunicate with clients, and use downtime to sharpen skills. Consultants who lead with empathy and candor during disruption retain trust and emerge stronger on the other side.

When the World Stops, Consultants Adapt

A year before any crisis hit, the mature and prescient called it scenario planning. Today the fancy phrases are contingency plan and business continuity. Roger Martin, former dean of the Rotman School of Management and ex-Monitor strategist, argued that strategy is not the product of endless research and modeling. His article on the big lie of strategic planning reminds us that good strategy emerges from making clear choices and articulating the logic behind them. 1 The same principle applies when the ground shifts beneath your clients. Assess, decide, and communicate.

Consultants face four immediate questions when disruption arrives. What should happen with current projects in motion? How should future proposals and business development proceed? What is the best use of bench time? Which perspective or quotation captures the moment? Over forty seasoned professionals shared their answers, and the themes converge on a few core principles.

Be Human First

Call your team members and check on their well-being. Your family is extremely important, and life is not only about work or money or success. Reach out to people you have not spoken to in years. Listen to your children, parents, and spouse. Express your emotions and take full breaths.

Be a thought leader and use that leadership to stay in front of clients. Do all of this in the context of getting your own house in order. You cannot serve your clients or your own projects if your house is on fire. Be kind, empathetic, grateful, and humble. Build trust and make the difficult decisions with grace.

Hard to get attention for outstanding proposals unless the client initiated them or the work is mission critical. Pushing too hard can appear desperate or oblivious to client business continuity realities. Sustaining existing relationships through caring contacts and meaningful conversations is always valuable personally and professionally. 2

Communicate Relentlessly

Put your project leaders and clients at ease through increased communication. Get out in front of their asks and communicate key contact information even if they already have it. Set up recurring calls to force communication if needed. Highlight upcoming milestones and any risks to achieving them.

Over-communicate with your sponsor and expect changes beyond the usual. Try to stay focused on the ultimate objective because flexibility will pay dividends down the road. Have engaged conversations around how to continue in this unprecedented time. There is scope for creative ideas, so try a few experiments.

Stay informed because many people do not know how to check or use sources of quality. You can be that voice of quality and encourage sensible actions. Remind people that the long run equals the long run and to stay the course on sensible decisions. For built projects, read your contract regarding force majeure events and assess potential delays from labor or materials issues.

Stop and Assess

Stop and reassess where this project fits into client priorities right now. Is it still mission critical, irrelevant, or delayed indefinitely? Proactively reach out to suggest what the client should do so they do not have to. Assuming you know the client business well, offer suggestions for strategies during these uncertain times.

Use this time to measure work done so far and recalibrate the scope. Redesign the approach and agree on a rollout plan for when things return to normal. Reimagine future projects through the lens of the current crisis. Identify all time-sensitive elements unaffected by the disruption and determine how to manage them.

For the next thirty days, management will be occupied dealing with immediate concerns. Business development will slow down, so evaluate what you can do now to hit the ground running later. Scope and rollout changes may be warranted. Prepare for best case and worst case scenarios because a wait-and-see approach is a non-starter. 3

Keep Doing Good Work

Current projects need to continue moving ahead because this situation will pass. There will be delays as staff figure out their personal lives, and we need to accommodate them. However, if we just stop everything now, we will never get the time back. Continue to make progress.

Most businesses are working through priority assessments of what is a must-have or nice-to-have expenditure. We need to be sensitive to the uncertainty they feel and be prepared for stop-work requests. Check in proactively or hold on doing too much work unless prepared to hold on invoicing. Agree on rules of engagement for unavoidable on-site work, then communicate the plan with your client.

Consider how different work cultures have solved similar problems. Being open to different cultures opens possibilities and alternatives that work for you. Some projects must be postponed, especially if they involve meetings and travel in restricted areas. In that case, reach a reasonable agreement with the customer regarding the postponement.

Invest in Relationships and Yourself

Continue to invest in building relationships without expecting any business commitment. Be generous with your thought leadership and insights. Business development needs to be considerate, and giving free advice and information is an investment in future business. Stay connected with prospects and understand if there is a way to help pivot your proposed work.

This may be an opportunity to show immeasurable value to clients at a challenging time. Move forward on a project at-risk if you have the time, or offer to do some work for free as a long-term investment in the relationship. Embracing and being frank about uncertainties builds trust and opens opportunities for partnership.

Take the time in silence to think. Upgrade your technical, strategy, and communication skills through online platforms. Pick a skill like Excel, presentations, or memo writing and add to your toolkit. Use the time to research ideas and maybe write that book you have been turning over in your mind. The world will look different once this crisis passes, so think about the possibilities and be ready to run.

Think Ninety Days and Beyond

Plan for a long delay of at least three months. Think scenario planning because clients are postponing rather than canceling projects, but that could change quickly. Expect pipeline delays of eight to twelve weeks. Focus on preparing the pipeline for the post-crisis period and consider which services will be relevant after.

Chunk projects into design, pilot, rollout, and evaluation phases. Charge for a design phase and then stage-gate before the initial pilot. Think strategically about where you can add value for clients and the types of projects that will maintain or grow in value. Better to commit long term to something you know will be a good strategic direction.

This crisis will require companies to adapt to the new environment. They will need to revamp supply chains, industrial footprints, and supplier bases. They will need to develop new markets and channels to balance their risks. Consultants should make proposals already projecting the period after the pandemic.

Find Perspective in the Disruption

Enjoy the moments, reflect, and keep up a daily routine of exercise. Cook interesting food and spend time with family. Read, play board games, and make a phone call to reconnect with someone. Tackle the long list of tasks that never seem to get done.

Times like these are challenging for smaller consulting firms. Review your marketing plans, pricing, and offerings. Determine where the bulk of your revenues come from and what you can do better. Maintain daily routines and structure to keep a sense of control and normalcy.

Winston Churchill reminded us to never let a good crisis go to waste. Abraham Lincoln advised spending the first four hours sharpening the axe. Maya Angelou warned that we may encounter many defeats but must not be defeated. This too shall pass, and the prepared will be ready when the fog lifts.

- 1The Big Lie of Strategic Planning, Harvard Business Review
- 2Business Continuity Planning, U.S. Chamber of Commerce
- 3How to Create an Effective Business Continuity Plan, CIO

Summary

Crises test consultants in ways no engagement letter can anticipate. Those who communicate generously, invest in relationships without expecting returns, and upgrade their skills turn disruption into opportunity. This too shall pass, and the prepared will be ready.