

Consultants Are From Mars, Clients Are From Venus

A unique instructional and investigative presentation provides a way for public and private sector engineers to establish better avenues of communication to work more effectively on projects together.

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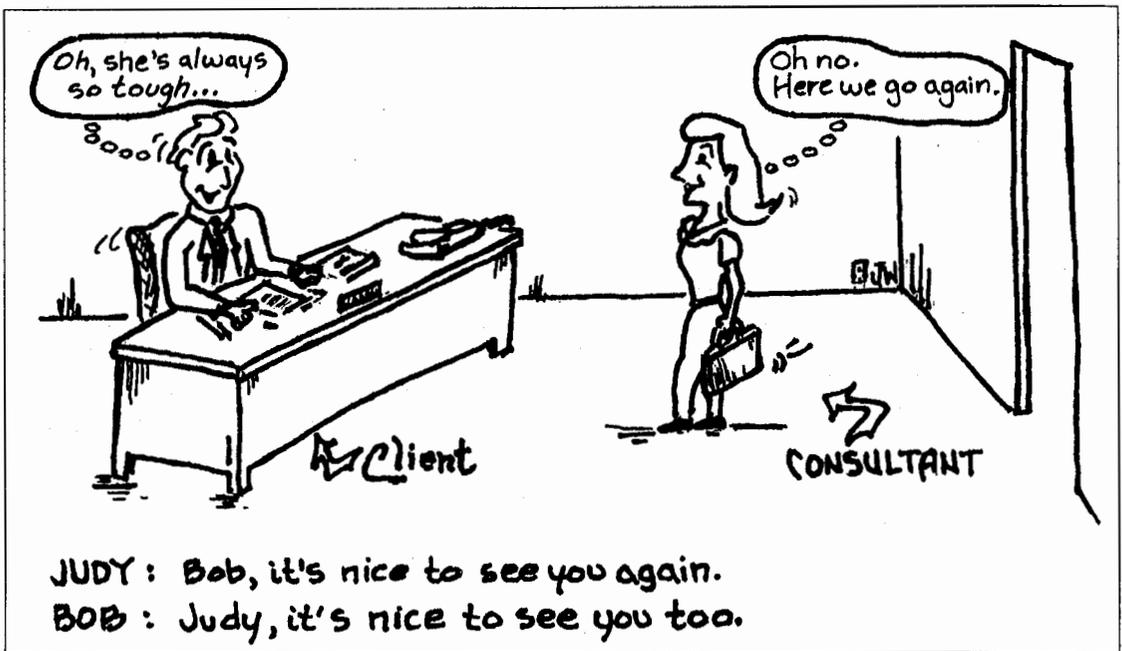
How differently do clients and consultants consider themselves? Most clients have never had to meet a payroll. Most consultants have never had to deal with public funding. The client knows what work product they want, and the consultant needs to interpret an often vague scope. The client deals with a difficult, often hostile, public; the consultant deals with sometimes difficult, often demanding, clients. The client feels the consultant should do whatever is necessary to get his/her project built regardless of the agreed-upon scope of services; the consultant needs and deserves to be paid appropriately. And, it

always appears that they both have too many lawyers!

The problems lie not with the apparently contradicting goals of clients and consultants. Often, the primary goals of both parties are the same; however, it is the *perspective* on these goals that differs. These differences could be due to one-sided methodology, or to adherence to approaches that worked with *other* client-consultant teams. No matter what the cause of the problem, the solution is three-fold: communication, communication, and communication. All parties have the best interests of the project in mind; however, they get caught up in the everyday grind of *miscommunication* and *non-communication*. When informing clients of their concerns, consultants may fear being perceived as acting to gain future jobs and clients may hold back information that may cause unpleasant side-effects, such as change orders.

The Program

Using the theme of the popular book, *Men Are From Mars, Women Are From Venus*, by John Gray,¹ a joint dinner session was held on April 2, 1996, by the Boston Society of Civil Engineers Section/ASCE's (BSCES) Engineering Management Group, and the Women's Transportation Seminar (WTS) Boston's Professional Development Committee. This session



caricatured the events engineers experience every day. It brought to the forefront issues near and dear to consultants and clients, and highlighted the contrasting concerns and common goals of both groups. The program confronted these issues head-on and produced pro-active solutions to common communication problems. Granted, nothing could be as complicated as the male/female relationship, but certainly consultants and clients come close.

The evening program that brought both clients and consultants together was structured as a *progressive dinner* so that the over 300 people attending could participate in a massive partnering session. The program was separated into three parts, one for each dinner course:

- A skit representing a project start-up meeting;
- Discussions based on that skit; and,
- A re-capitulation skit presenting ideas and solutions.

Lecture-goers were given a name tag with three numbers, each of which represented a table to which the individual was assigned during the evening (again, one for each course). All tables were specially assigned to have the best distribution of both private and public sector em-

ployees, but the seating arrangements were otherwise random.

The program opened with a re-enactment of a project start-up meeting. The participants of this "mock" meeting were portrayed by some of the most respected professionals in the field of civil engineering in the Boston area.

The Skit

A client, Bob, and a consultant, Judy, were the main characters in the skit. Bob and Judy, who were both played by engineers, acted along with another two engineers who spoke their unspoken thoughts. These "unspoken thoughts" are indicated by being indented and set in italics. The setting is at the client's offices, where Judy and Bob (and their hidden thoughts) debate the details of an upcoming engineering consultant contract. Stage directions are in brackets.

Judy: Bob, it's nice to see you again.

Bob: Judy, it's nice to see you, too.

Judy: Oh, no. Here we go again . . .

Bob: Oh, she's always so tough . . .

Judy: What a great tie!

Bob: Thanks. New hairdo? Looks nice!

Judy: Thanks. Do you realize it's been over eight months since you selected us for this project? Gosh! Who would have thought it would

take this long just to start to negotiate a contract?

Judy: *Typical government job . . .*

Bob: I know what you mean.

Bob: *She doesn't have a clue about what processes we have to go through to get a consultant on board.*

Judy: We're excited to be working with you.

Bob: *All consultants say that — let's see how they perform.*

Bob: Here's two copies of our standard consultant agreement and attachments. All we've got to do is get your fee and insert it in here. Here's our scope. We'd like to get this signed by Friday.

Judy: *What's the rush? I've got to send it to my lawyer to review and then digest it myself. No way can it be done by Friday.*

Judy: Bob, How do we handle revisions to your standard agreement?

Bob: *Here we go again. Another consultant who wants to change our contract. Don't they know the problems I have with Legal whenever this happens?*

Judy: My insurance company won't let me assume the liability in here.

Judy: *This is so unfair.*

Bob: I'll see what I can do.

Bob: *We're not going to change it, so don't bother.*

Judy: Well, I'm not an attorney . . .

Judy: *Thank goodness.*

Judy: . . . so I've got to have mine review this and tell me what it says.

Judy: *Why don't they write it in English so we can understand it?*

Judy: I'll get back to you as soon as I get our lawyer's input.

Bob: *And there goes another three weeks. When are we going to start this job?*

Bob: Just remember, this project has to be out to bid by November . . .

Bob: *Election Day.*

Judy: *Oh, sure. The Notice to Proceed slipped by four months, but the due date doesn't move.*

Bob: We made a commitment to the community to get this completed by 1998. I'm relying on you to help me meet that commitment. [He punches Judy's shoulder.]

Bob: *The governor will have my head if we don't break ground before the election.*

Judy: We'll do whatever we have to do, partner. Don't worry. [She punches Bob's shoulder.]

Bob & Judy: *Be happy.*

Bob: You're going to have to change your schedule so there's enough time for agency reviews. That was one of the deficiencies we noted in your proposal.

Bob: *Those consultants have no idea who I have to touch base with — environmental, bridge, highway, the mayor, etc. They're not sitting around just waiting for this project to come in the door, you know.*

Judy: No problem. Tell me how much time we should include for each review. We'll submit a revised schedule.

Judy: *I can't believe this.*

Judy: Bob, I'd like to talk about your expectations on our first submittal. It'll be at the 25 percent stage.

Judy: *Yeah, they'll want 100 percent by then.*

Judy: We've found, in the past, that your definition of 25 percent and our definition of 25 percent are very different.

Bob: *Yeah. We'll get 10 percent if we're lucky.*

Bob: I'll give you a set of plans we received recently from another consultant which you could use as a guide. [He gives a big smile.]

Judy: Great. [She says slowly.] Thanks. Now, another question I have is on additional work.

Bob: *Great, the job hasn't even started and she wants to talk about extra work!*

Judy: Neither one of us knows what the entire scope of work will be at this point. I'm sure we'll end up not having to do some things you've included, and I'm sure we'll end up doing some extra tasks. I just want each of us to understand the process, so I'm not left holding the bag. Last time, we went ahead with additional work in order to meet your schedule — then we couldn't get paid for it because we didn't have an agreement.

Judy: *You can't have it both ways, you know.*

Bob: Don't worry, Judy. We'll take care of you.

Bob: *Yeah. We're from the state. We're here to help you.*

Judy: *Uh-oh.*

Bob: Our biggest problem is when you don't tell us when you're doing out-of-scope work.

Bob: *And then you tell us about it six months later, when we can't do anything about it.*

Judy: Don't worry, Bob. We'll track it.



Judy: *We sure will.*

Judy: Now, Bob, another question I have is regarding payment. We'll submit our invoice monthly. What format do you want it in?

Bob: The usual.

Bob: *What do I know about invoices? I'm an engineer.*

Judy: Bob, your "usual" invoice format changes with every project.

Judy: *I don't care which one we use. I just want to use the right one the first time.*

Bob: I'll send you the format we want.

Bob: *Right. That's high on my priority list.*

Judy: *I get nervous when he says he'll send me something but doesn't write any notes to himself.*

Judy: [She replies innocently.] Great. Thanks. My other invoice question relates to how you'll process our bill. [She goes on quickly.] Once we submit it to you, where does it go? Who else has to approve it? How long will it take to get the payment processed?

Bob: The usual.

Bob: *I don't know and I don't care. She knows we're good for the money. Of course, I don't dare tell her we won't have the funding until July first.*

Bob: One thing I do know is that those bean counters want everything to be documented and everything to add up.

Judy: Are you telling me that we could have a \$30,000 payment delayed because we're missing a \$5 parking receipt?

Judy: . . . *or because the addition is off by three cents?*

Bob: Well, that's the way it is around here.

Bob: *I don't see why they can't get it right.*

Bob: Now I'd like to talk about the Scope of Services. Your proposal suggested some things that may not be necessary. I think we can delete maybe \$100,000 from your fee.

Judy: *Holy smokes!*

Bob: [He laughs to himself.]

Judy: [She smiles and recovers.] Let's see what they are, and go over them one by one. I've got a few questions myself, and some of them may increase our fee.

Bob: *Typical consultant — always trying to gouge us.*

Judy: After walking the site and reviewing the studies, I see a real disparity between your suggested Scope of Services and what I know the permitting will require. We are always uncomfortable giving an agency exactly what they ask for when we know you'll need us to do more than that.

Judy: *If only what they asked for matched what they really need!*

Bob: Let's make that the single agenda item for our next meeting. [Pause.] We're almost out of

time here, and I want to review our Women's Business Enterprise and Minority Business Enterprise goals.

Judy: *It must be lunch time.*

Bob: [He does a golf swing.]

Judy: No problem. We have the best WBE and the brightest MBE on our team. Each is doing 5 percent of the work, just as your goals require. [She punches the air.]

Bob: *Wow! Hit those minimums again. Doesn't she know that we're looking for meaningful participation?*

Bob: Well, why don't you get the team together for a meeting in the morning? We'll discuss all the scope changes and see which team members will be doing what part of the work.

Judy: *Tomorrow morning? Does he really think that we're all sitting around with nothing to do but this project? It'll take a week to coordinate everyone's schedule for a meeting like that.*

Judy: I'll see what I can do, Bob. [She shakes Bob's hand.]

Bob: Well, let's get going on this project. [Big smile.]

Bob: *Money grubber!*

Judy: *Bureaucrat!*

Bob: *Opportunist!*

Judy: *Political hack!*

Bob: *Stupid hairdo!*

Judy: *I hate your tie!*

The scene above might seem very familiar and the characters very real. Any similarities between Bob and Judy to actual colleagues is completely intentional. Attempts were made to make the story as true as possible. While the names have been changed to protect the "innocent" (for example, Robert has been changed to Bob), what happened is repeated too often every time a new project starts: one where two individuals with the most influence on the project talk, but don't communicate; listen to words, but don't translate; empathize, but fail to understand. As a result, this miscommunication unnecessarily makes the project a burden to complete.

By the end of this skit, the audience was considerably loosened up. Keep in mind that the audience had no idea what to expect. What would normally have been a relatively formal technical dinner meeting had turned into a

comical and relaxed look into consultant's and client's innermost thoughts. The humor in the skit helped attendees break the ice with their first set of tablemates.

Facilitated Discussion

The second portion of the program centered on interaction at the tables, where attendees discussed predefined client-consultant communication topics. "Facilitators" were assigned to each table in advance of the lecture. The facilitator's first job was to make sure that the people sitting at the table were introduced to and became familiar with one another. The second job was to guide the discussion and to attempt to prevent attendees from getting too much indigestion during the main course. The discussion topics were listed on cards, called "Communication Challenge Cards," that had been placed in the middle of the tables. It was the facilitator's job to read the issue topic on the Communication Challenge Card and start the discussion. Getting the fairly conservative attendees to loosen up was finally achieved and participants found that they were laughing at themselves along with their newly found acquaintances.

The discussions represented, and functioned as, a paradigm shift. The Communication Challenge Cards were written so that clients and consultants would swap shoes (not literally) to see what it feels like from the "other side." Participants were asked to interject thoughts like, "I guess from your point of view it would be better if . . ." instead of "I can't because . . ." Paraphrasing from the book, *Men Are From Mars, Women Are From Venus*, and changing John Gray's words to adapt to the consultant/client theme, emphasizes the theme of communication:

"Not only do consultants and clients communicate differently, but they think, feel, perceive, react, respond, need and appreciate differently. They almost seem to be from different planets; speaking different languages and needing different nourishment. This expanded understanding of their differences helps resolve much of the frustration in dealing with and trying to understand each other. Incorrect expecta-

tions are easily corrected, but they are only easily corrected when they are communicated."

Dinner was served while the facilitated discussions ensued.

Finding Common Ground

For the final course, the speakers gave suggestions on how to deal with common issues clients and consultants deal with on a daily basis. The "actors" of the start-up meeting skit again began to re-enact a conversation between a consultant and a client, except this time a different approach was taken using partnering. Both client and consultant wrote down their goals and concerns about what things might get in the way of meeting those goals. A pledge was made in advance that, as principals in the contractual arrangement, each would be committed to addressing the others' goals and concerns. It was all laid out briefly and honestly. It turns out that the goals were nearly identical, or, at least complementary. It was found that the concerns were what conflicted and needed to be sorted out. Each concern was addressed and an appropriate action was identified. The consultant may fear that laying it all out on the line could jeopardize future work; however, if the approach results in a job well done and it achieves positive feedback and a good reputation, this can only be a step in the right direction.

This dinner presentation was intended to provide a means of initiating discussion from all participants — consultant and client alike. These discussions further developed the ideas of presenters. What resulted was greater than any one individual could prepare alone. Ideas were generated from engineers throughout the Boston area.

Lessons Learned

Both the client and consultant have a key shared goal: coincidentally, both client and consultant have "on time and under budget" as a common goal. However, understanding a little more about each others' goals and how to make this work is needed. The following other goals can get in the way of the fulfilling this shared goal.

The Client Needs a Satisfied Constituency. The client has to please the people that are paying for this project. However, this goal of satisfying a constituency has to balance with other goals. Providing all wants and desires can conflict with original contractual agreements, specifically cost and schedule clauses. The consultant needs to realize and point out exactly what impacts the contract. The consultant also knows what a client wants is not always the best engineering solution. Given contractual and engineering conflicts, the client could then reevaluate requests and possibly alter them.

The Client Needs a Happy Workforce. People thrown together for a limited time can create conflicts in how they are used to doing business. The consultant, who is, for example, the storekeeper, can take the approach that "the customer is always right," knowing that this is not always the case. The consultant needs to work with the client to ensure that the client gets exactly what the clients wants, and not what the client thinks s/he wants.

The Consultant Needs a Satisfactory Cash Flow. The fact of the matter is that the consultant is in business to make money by providing a professional service. People that work for a living, need to get paid.

The Consultant's Goal Is to Have a Satisfied Client. What better compliment to a client/consultant relationship than to make sure that the customer is always satisfied. Not unselfishly, the consultant wants to get a letter of reference at the end of this job.

It's Got to Be a Good Job. Not coincidentally, this is also a common goal for both the client and the consultant. Both sides are willing to work hard to engineer a superior project — one that serves the public well, is of high quality and is well executed. Both serve to gain by a job well done (for the client, a satisfied constituency; for the consultant, an excellent work reputation).

Although these goals seem to complement one another, the client's and the consultant's concerns complicate the relationships.

Client's Concerns. The first concern is that *design needs to keep going forward even if there are glitches in the availability of funds.* The consultant has the same concern. Work stops and starts make staff allocations difficult, and schedule



JUDY: I am looking forward to working with you again Bob.
BOB: Let's get the job done!

delays erode the project budget. The client should keep the consultant informed up front of the financial situation. Keeping the communications open regarding the finances will allow for better planning when glitches do occur, because they will occur. The client, if from the public sector, works on a fiscal year basis, subject to the legislature and federal appropriation codes. Financial glitches will be more of a surprise when the consultant does not know they are coming. Keeping the information flowing could resolve this concern. Another possible solution could be to delay some aspects of the project. Other parts of the project could be done while waiting for the financial difficulty to be ironed out. Keeping each other informed is the way that both the client and the consultant meet their goals — no secrets.

The second concern is that the *client's staff is important*. The consultant's staff must be sensitive to client's staff needs and feelings, too. Consultants must understand that there are a lot of dynamics that occur when a consultant firm comes into a public agency. Sometimes those dynamics do not go well. Open communication on what's transpiring, being aware of personality conflicts between the client's staff and the consultant's staff, and taking action immediately on any potential conflicts could create a more civilized working environment. An-

other idea is to bring the project engineers and other staff together face-to-face. In the skit, Judy and Bob know each other and are friends. Getting their support staff together to get to know one another enables them to understand one another better and work towards common goals.

The third concern is that the client needs *good communicators*. The consultant's staff is going to be selling the project to the neighborhoods. The client wants people who are able to communicate well. Good engineers do not necessarily make good communicators. One solution is to bring the consultant's best communicators to the front line. This move could mean that the project engineer rather than the project manager makes the public presentations. Put the right person in front of the audience and make sure that the information is communicated effectively.

The fourth, but the most important concern is that *problems take too long to resolve*. The people doing the work need to be talking to one another. If they understand the objectives, they are more likely to identify problems and make sure they are brought up to the right level. Doing so will ensure that problems are resolved as quickly as possibly.

Consultant's Concerns. The first concern is *invoice processing — how it will happen*. One way to

facilitate the process is establish the invoicing process before the first invoice goes out. The consultant should submit a sample invoice for review and comment. The client should explain the review/approval/payment process to the consultant. Another helpful measure is to maintain open dialogue between the consultant's invoice preparer (*i.e.*, administrator, bookkeeper, etc.) and the client's processor. These two peers can work out detail problems directly without involving upper level managers. This method allows billing and payment to proceed with fewer delays due to detail issues.

The second concern involves *scope and schedule*. First, the principals should understand what exactly are the scope and schedule, which can be best accomplished by including a complete, tight Scope of Services in the contract language. It is in everyone's best interest to have an accurate understanding of the work that will be performed. Secondly, all parties must understand and agree with scope and schedule. "All parties" include not only the managers, but the people who will actually be doing the work. This information needs to be disseminated within the department and staff of all working parties. The more the staff "in the trenches" knows on both ends, the more likely they are to know the expectations for the schedule and understand what scope is additional, and what scope is not additional — and determine whether it is truly feasible to get the required work done according to the schedule.

The third concern is dealing with *extra work*. Additional work should be identified and be compensated when the work is authorized. Authorization of work cannot lag behind the work itself. In addition, the client should be notified of changes in scope early, not six months later. In-scope and out-of-scope work should be identified before they are actually happening or as they are happening so there are no surprises. A means must be established at the beginning of the project for dealing with any additional scope that may become necessary in the course of the project. It is difficult to predict at the beginning every work task that will be required for completion of a project. Having a method in place to do so removes some of the reluctance that both parties have in dealing with the extra scope issues that invariably

arise. This method should include a procedure for granting preliminary approval so that work can commence while the cost and schedule impacts are established and contract amendments are executed. Time and again situations have arisen where it is difficult or impossible to put these amendments in place prior to at least starting the work.

The fourth concern is that the client appreciate, when dealing with extra scope, that *additional fees and schedule adjustments be recognized*. The client needs to understand that extras will have an impact on fees and to ensure that its staff understand that there are impacts. The complementary and contradictory nature of quality, schedule and cost must be understood. In simple terms, it is only possible to have a fractional combination of the following: a good project, a quick project and/or a cheap project.

Summary

The more clients and consultants understand each others' goals, the better everyone will be for it. The job will meet the expectations of the client, and both the client and the consultant will be happy with the final product. Expectations are met because the client knows what is happening every step of the way. If a change in the contract comes about, the client is aware of its impacts. The consultant knows that the client is getting what the client wants because the consultant has contributed engineering judgment and highlighted possible solutions to the client's intentions. The final solution is in: communication! communication! communication!

ACKNOWLEDGMENTS — *Many thanks go to the brave team of volunteers who created and participated in the dinner lecture of "Consultants Are From Mars, Clients Are From Venus." Robert Albee was from the planet Venus, the client side. He is Director of Construction Services at the Central Artery/Tunnel (CA/T) Project in Boston. He is well known and well respected for his ground-breaking partnering effort at the CA/T Project. Judy Nitsch is President and Owner of Judith Nitsch Engineering, Inc., making her a Martian of the highest order, representing the consultant side. Karen Arpino, who played the villain — that is, the consultant's innermost thoughts — is Director of Design and Con-*

struction at the Massachusetts Bay Transportation Authority (MBTA). James D'Angelo claims the role of the client's real thoughts as a Senior Vice President at Vanasse Hangen and Brustlin, Inc. The lecture was presented by Joel Lunger, Vice President, HDR Engineering, Inc., representing the BSCES Engineering Management Group, and Malinda Foy, Senior Manager, Cambridge Systematics, Inc., representing the WTS Boston Professional Development Committee. Special thanks to Jason Wagner, a Project Engineer at Gale Associates, Inc., who provided the visionary cartoons.



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REFERENCE

1. Gray, J., *Men Are From Mars, Women Are From Venus: A Practical Guide for Improving Communication and Getting What You Want in Your Relationships*, HarperCollins, 1992.