

## CRAFT OF CONSULTING PODCAST

### EPISODE 37: Lessons in Successful Consulting from a Former Client and Consultant—with Rajan Dev

Speaker 1: Welcome to The Craft of Consulting Podcast, the podcast where you learn the skills and know-how to excel at consulting while living the life you want. And now your host, Deb Zahn.

Deb Zahn: Hi. I want to welcome you to episode 37 of The Craft of Consulting Podcast. My guest today is Rajan Dev, and he is going to bring a really unique perspective, actually, two perspectives. So he has been a client who has hired many consultants, and he's going to talk to us about that. Plus, he's been a consultant who has been hired by many clients. And he's going to talk to us about that. And because he's been in those two roles, he's going to be able to offer really fantastic advice for building your business and keeping your clients happy. Rajan has amazing experience that he's bringing to this. So he has worked with the development and incubation of digitally enabled products, services, and businesses, most recently as a global agency strategy director at Facebook, Inc. And that's where he did business development with global agency holding companies and consultancies. Before that, he was the president and COO of Hot Studio, which was a digital product strategy and design agency. And he has a lot of other fantastic background that he's going to draw upon. So let's get started. I want to welcome my guest today, Rajan Dev. Rajan, welcome to the show.

Rajan Dev: Thank you very much, Deb.

Deb Zahn: So let's start off. Tell my listeners. What type of work do you do?

Rajan Dev: Well, I've done a lot of different things, everything from IT consulting and big systems development, to consulting, to design strategy, and then most recently, a lot of work with business development and sales with global agencies in my last role at Facebook.

Deb Zahn: That's great. So this is really helpful for our listeners because you've been on both sides of the table. You've been a consultant, plus you've actually used consultants. So tell us a little bit about what you've used consultants for.

Rajan Dev: So on the most basic level, there've been programs or projects where consultants from the client perspective, or my perspective, were really about filling out a team. And so we were looking for very specific expertise. And some of it was, let's say, technology, or design, or even strategy consulting. And then it was about matching up what we had with what we needed from outside for a finite period of time, with clear goals around the program or project, and then having people play those roles to get things done. So that was probably the most basic level of work with consultants.

But we've also used consultants for big things too. And those would be things like consulting on what business should we acquire? Or consulting on how to think about packaging up and selling a business. And of course, those are very different things too.

- Deb Zahn: And so when you have a potential consultant in front of you, and you're assessing whether or not they're the right fit, what type of things do you look for besides the very precise expertise you need?
- Rajan Dev: Well, I think number one is: Do they know how to listen? Because ultimately, listening to your client is going to be how you understand what needs to be done, what's important, and also, the absolute secret sauce is envisioning what might be important and being ready to bring it to the table when the time's right.
- Deb Zahn: That's right. And so how can you tell if they have that?
- Rajan Dev: Well, in general, I think it's different for different people. And you kind of think about the spectrum of where people are coming from. But at the end of the day, when it comes time to look at the basics of a work plan, does that consultant have the elements in it that you talked about and hopefully agreed upon around the things that you were going to do, whether it be tactical and operational or large and strategic?
- Deb Zahn: That's right. That's usually a good litmus test because if they blatantly miss things that you talked about, or you need it to be a bridge to some potential outcome, and there's no bridge there, then that's usually a good sign that they're not thinking in that sort of strategic way based on listening to you.
- Rajan Dev: And I think also, there's that full spectrum of who you are as somebody hiring a consultant, which is if you've done it for a long time, a few words can tell you if somebody's tracking, or is going to get on it, or doesn't need to document anything, and it's all going to work. Or quite the opposite, oh no! He's a poor planner, we need to know exactly what's going to happen because I'm not quite sure.
- Deb Zahn: That's right. And for folks who've hired a lot of consultants, as you said, that can happen really fast, which is why, for consultants, putting your best foot forward as soon as possible in an encounter is so critical. So what are some of the best things that you've ever seen a consultant that you hired do for you, that just made you say, "Wow. I love this."?
- Rajan Dev: I'd say the best type of responses are "Yes, I hear you." And then essentially a recounting, in their own words, of what they heard. And because I heard you, the projection, and this may happen in multiple conversations, somebody who's really good and really experienced, it can all happen in a conversation. But it's the "I heard you, here's what we're going to do about those things. But I have this expertise, and there are some implications of what you asked me for. And would you like to talk about those?" And if I say yes, then I would love to hear what those things are. And then those may turn into other things that are in our parking lot of what's going to happen next. Let alone sometimes that consultant, in an unexpected time, bringing something to the table, to a meeting, to a process, to a deliverable, that is a direct implication of the work

that only they understood, but I didn't as a client. And then it's a big aha of, OK, we are really bringing something extra to the table.

Deb Zahn: That's right. And thank God you're here so that we now know this. That's wonderful. Anything that you've seen that you would tell new consultants who are trying to figure this out, just flat out "Do not do this."?

Rajan Dev: Actually, I think I made some of these errors myself early on, which is as a consultant, you work for a company. Your company pays your paycheck, unless you're independent. Right?

Deb Zahn: Right.

Rajan Dev: And if you're independent, your connection to the marketplace is a lot more defined. And in fact, that's kind of good for the "got you" that I'm thinking about, which is if you're working for a company, and you are consulting, you may have specific goals and targets that you are responsible for. Your client doesn't need to know that in any way. Don't let it leak. Focus on your client and their needs because the moment you're not, it is apparent, and your trust is broken. And nothing good is going to happen.

Deb Zahn: That's right. And the trust piece, and I've seen by the way, exactly what you're talking about, where suddenly consultants start talking about their hourly goals that they have to hit. And why would their client...They shouldn't care about that. That's not in service of them. So the trust thing is really key. And that's obviously something that really good consultants know how to establish and maintain. What do you like to see them do over the course of an engagement that actually builds that trust?

Rajan Dev: And I think that's ultimately the emotion behind it is empathy. Right? And there are certain degrees. There are degrees to which somebody could, as a consultant, have that and actually demonstrate it for their client. And I'd say when I'm a client, I'm open to that full spectrum from the basics to something amazing because often people will bring something else amazing to the table other than that. But that being said, the most basic is: Am I keeping my client's best interest at the top of my thinking? And if I am, then that will translate into delivering things that are both important and impactful for my client.

And then the rest is about style and ways of communicating. And certainly, there are going to be some clients who need to be communicated with in ways that they can receive. Right? You kind of go back to learning styles and communication styles. And I think depending on the level of experience of your client, that may or may not be required. But certainly, I've definitely seen situations where the work done by a consultant was excellent. The empathy that was behind it was excellent. But not knowing how your client needed to hear the message or discuss the message got in the way. So there are a couple of layers there.

Deb Zahn: That's really helpful. And that's sort of where you start to get into some of the Jedi consultant tricks of being able to really discern different communication and learning

styles of your clients. I always like to ask at the beginning. And then I pay attention to whether or not what I heard was actually true because they might think they have one style, and it's actually not that. Now one thing that often happens on projects is changes happen. Everything isn't exactly what you envision when you first develop the contract. So how would you suggest, and this is where drawing on your own consulting experience is probably very helpful, how do you suggest a consultant handle that if things start to change on a project?

Rajan Dev: I'd say change and the communication of change are an implication of some basic things. Right? So it's very difficult if you're not doing the basics. And I would say this is another topic we haven't quite talked about yet, but it's the corollary to putting your client's best interests first. And it's A, never surprise your client with something negative. And B, be very direct always because that's how you build trust, especially in this kind of business relationship. And so the question of change, as I correlate it to other things, is really about well, OK, something has happened that sends you into a different direction, or it would be smart to do something a different way. And ultimately, you as the consultant, the way to get ahead of that is to lay the groundwork for an expectation that you're going to be communicating with your client in a frequent and a direct way, and that as things change, that's just part of your communication as opposed to a big deal.

Deb Zahn: That's right. And that change is a normal part of everything, of every project. And if I'm a consultant who actually cares about your best interest and I'm paying attention, then I might suggest changes we should make that gets you to whatever your outcome is.

Rajan Dev: So you're kind of, as a consultant, maybe projecting that what you see is going to lead to a change that's going to head in a specific direction. But by having that regular conversation and bringing something new to that conversation with your client, you may learn about something you didn't envision, or you didn't know about that, in fact, is really important, i.e., a change in organizational structure, or a change in budget, or a change in who knows what strategy. But then that conversation will drive a really healthy set of OK, here's our new set of facts, and here's what we need to do about them.

Deb Zahn: You mentioned that there are some basics. And you indicated a few of those. What are some of the other basics that, if you're a good, solid, or great consultant, you just do these things?

Rajan Dev: We talked about listening and empathy. We talked a bit about constant communication. And keeping your client's interests at heart. I'd say the other one is being really clear about your expertise and not getting ahead of it. There's nothing I like more as a client than when my consultant says, "You know what, I know a little bit about this. And I know we need this expertise, but it's not mine." And that alone is good and important. And what I value then, even more, is if the consultant has gone the next step and done a little bit of research, or consulted their Rolodex [contact list], or consulted their

company directory, and says, "And I have these three people we might want to talk to, who might be able to bring this to the table because then we can just keep rolling."

Deb Zahn: That's great. I love that. And I will say, again, not just for new consultants, but even ones who've been doing it a while, it can be seductive when a client asks you to do things that are really outside of your expertise. It's a compliment. It means they trust you. It means they think you do excellent work no matter what. But if you want to maintain a good relationship and a good reputation, say, "No. But I've got somebody else that I would suggest." is I think the single most important thing you can do. And I fall into that trap. I've fallen into that trap recently. I know. It's painful.

Rajan Dev: It happens.

Deb Zahn: And I have to go back and say, "I'm not the best person to do this. I think the outcome you want is so important that you need the best. And I'm going to help you find it. But even though you like it when I do this with you, you're not getting everything you need, and I need to stop doing it."

Rajan Dev: That makes me think of two things related to things we've already talked about. So one is that relationship with your company or firm's goals. And yeah, that seductiveness of, oh my gosh, I just opened up 200 new hours of important things I could be doing if I could sell in this expertise. But how comfortable am I? Am I going to be able to maintain that same level of trust? Right? And so finding that balance is really important. Now this might be for the advanced course, but I think then how you slip stream that into something that still enhances your value as a primary point of contact is the facility with program management. Right?

Deb Zahn: That's right.

Rajan Dev: Which is, you have the trust of your client as their program manager, not just an individual consultant, then your responsibility is to manage the ebb and flow of expertise to achieve a goal while keeping that overall program in place. So that's kind of the way out of it, and that may not be apparent when you're just starting out, but definitely part of, over time, how you deal with it.

Deb Zahn: That's right. And the shine of bringing in other experts, some of that will stick to you.

Rajan Dev: That's right.

Deb Zahn: Because you helped make the outcome happen by bringing together the right group of folks to do it. And yeah, I would agree. I think that's better than just handing people off to somebody else, who you may know has the expertise, but you may not know if they're going to be able to get your client where you want them to go, which is why often staying involved is very helpful.

- Rajan Dev: Exactly. And also, just as a kind of footnote, if you're interested in consulting, it probably means that you like learning new things. And what better way to learn new things than from experts who are solving problems that you're intimately close with.
- Deb Zahn: That's right. And I would say from where I started a decade ago, that's been one of the biggest avenues of where I've learned new things, including learned enough that I can do more, but I also know where my boundaries stop. And I know when I need to bring them back in. But that's wonderful. So another big thing that always happens in projects along the way is something goes wrong. Consultant makes a mistake. The deliverable, you mentioned for example, was great, but it wasn't the right thing that the client expected. Something goes wrong. What's the best way for a consultant to manage that?
- Rajan Dev: Yeah. Something goes wrong is the extreme case of change. Right?
- Deb Zahn: Yeah.
- Rajan Dev: And it's really the same thing, but usually there's even more anxiety and more at stake and all of that. But the first step is triage of just really being super clear, owning what happened, and then digging into what it was, deconstructing it, and figuring out what the steps are to get it on track.
- Deb Zahn: I would agree. And that straightforward approach, I have found, works the best. And that radical honesty, ruthless honesty with yourself or with your team. I remember being on a team and something had gone awry. And we did a sort of forensic analysis of what occurred. And at the beginning, I heard, no, no, no, it wasn't our fault. And by the end of it, about 30% was our fault. And that matters, and it matters to the client. It should matter to us.
- Rajan Dev: And I think part of that is, and especially for you and others who've done this for a while, it's that experience base of stuff happens. And also, on a spectrum of sometimes there's no responsibility, to there's full responsibility. And usually, it's somewhere in between. So you might as well get on it fast, which is the most important thing. And then communicate what you know and be really clear about what you're doing about it.
- Deb Zahn: That's right. The solutions, you better show up with solutions in your pocket that you can deliver on.
- Rajan Dev: Yeah, because I think most people, whether they're on the client side or the consulting side, have some experience that most things have their hiccups. It's the rare thing that goes without any unintended consequences, or obstacles, or mistakes. And the best way to tap into that experience and resilience and understanding is to be super clear that you're a trustworthy conduit of facts.
- Deb Zahn: That's right. And you're not trying to hide anything or bury it in a 10-page report because you don't want them to pay attention to the fact that you made a mistake.

- Rajan Dev: Yeah, because the implications of that are, even in the short term, it becomes fairly apparent pretty quickly. And you start eroding your trust. In the long term, if something comes out that was clearly hidden and it took a while, bad news is not like fine wine. It does not get better with age. And in fact, it goes to vinegar faster.
- Deb Zahn: It does. And not the kind you want to cook with. I like that because essentially what you're saying, and I think this is very true, is if you want to be a successful consultant, it's a long game. And you might feel like you can play the short game here and there, and that'll be fine. But if you want that reputational capital that's going to bring you business and bring you repeat business over and over again, you have to play the long game. And the long game is a relational game.
- Rajan Dev: Yeah, you bring it in closer to home—how you really bring this into your heart if it's something new and you haven't really got it, which is, think about it as personal and your best relationships. Right?
- Deb Zahn: Yep.
- Rajan Dev: You might be able to pique somebody's interest with something snazzy and zippy but, over time, I'm sure we all have relationships with people we've had big arguments with. And at the end of the day, the way you build stronger relationships is at least you trust each other. Right?
- Deb Zahn: That's right.
- Rajan Dev: And ultimately, that's usually based on: Does this person represent facts to me as they see them, which may be different from how I see them?
- Deb Zahn: That's right.
- Rajan Dev: And do I value that?
- Deb Zahn: That's right. And do I think they're doing their best to state what the facts truly are?
- Rajan Dev: And is there care for me in the interaction?
- Deb Zahn: So if you had a professional in front of you who is thinking of being a consultant, and they had a lot of specific expertise in whatever their field is, but you wanted to direct them toward getting some skills that every consultant needs to have. So I would send them to information on active listening and things like that. What skills do you think every consultant needs to have in their pocket to be able to do?
- Rajan Dev: So that's a really hard one. And this is actually something I experienced in my first consulting job because I came into consulting after having a first career, and then going to business school. And the guys who were hiring me were all Accenture and Deloitte

guys. And they were well trained, had a lot of experience. And they kind of looked at me and said, "Wow, you have a lot of experience, but you haven't really consulted. And the way we're running this firm right now is we don't have the resources that we had at Accenture to bring you into it over three to five years. You're going to be tossed in." I'm really thankful we had these direct conversations because they were telling me what was coming and what their perspective was. And they were describing something that I didn't have real experience with. Right?

Rajan Dev: So I didn't know exactly how to take it. Should I take it personally? Should I take this factually? And what ultimately it came down to was even if you're jumping in at above junior level, it's: Who are you mirroring? Who are you watching? Who are your mentors? And that might be difficult if you're an independent consultant and starting out. But I think, ultimately, having resources like this is going to help because even just some of the things we've talked about in the last 30 minutes were not things that were apparent to me when I made that leap into consulting with a little tiny bit of scaffolding. But ultimately, the thing that got me through was working closely in preparing for meetings, especially with a few of my colleagues, who on one hand felt like, oh damn, I don't want to do this. But on the other hand, it was like, OK, we've hired this senior guy. And we're not going to be able to bring him through and make him useful unless we spend a little time with him.

Deb Zahn: And the prep before you go into the fray I think is critical. And that's something I've seen. So I used to work at a firm. I'm now independent. I've seen a lot of folks skip because they think, "I'm about to go into this. I know my stuff." But that doesn't mean you know how to guide a meeting toward a good conclusion that's really often different than what you had to do before. And so the prep that goes into it should be taken quite deliberately and spend some time. As my husband likes to say, "Even high school basketball teams practice." So don't have the first time you describe yourself be when you're in that meeting. Don't have the first time you describe what your firm does be when you're in that meeting. You've got to have that so it just rolls off the tongue. You've got to think about how you pivot at certain times. Not to be manipulative but just to keep the conversation going in a good direction. How would you know that from a previous position?

Rajan Dev: I think about the kind of concepts that you really have to lock into in that environment. Whereas if you're an employee in a firm, in a job, you have a certain amount of resilience built in, which is they've hired you. They're going to deal with some things working and not working. And they're probably, if it's a decent organization, committed to your growth over time. As a consultant, that rope is much shorter, and that's kind of what you're working against. So OK, knowing that, then through prep especially, it's really understanding what's the expectation for this meeting. What are the potential deviations from that expectation that might be there? Who else is going to be in the meeting? And what are they bringing into it that might affect those things? Are there things you can do in advance of that meeting to make sure you're as close to right as possible by checking the agenda and checking in with your stakeholders, and maybe

even checking in with potentially hostile stakeholders to really make yourself well prepared?

Rajan Dev: And then thinking about: What is the context of this meeting in terms of the longer-term relationship that you want to have with these clients and the entity, et cetera? Right? So if you're asking all these questions and doing that work, then more than likely, even if you don't have a role model in the meeting with you or helping you prepare, some of these things are going to help you make sure you're on track.

Deb Zahn: That's great. So I'm curious. You were the smart new guy that they hired who hadn't been at any of the big firms or been inundated in consulting. So what helped you take the leap from the smart new guy to the guy they wanted to have in the room with them?

Rajan Dev: So what I learned, and having some experience helped me, even though it wasn't consulting experience, which was each of those senior guys I was working with, and gals, had very different ways of preparing and very different ways of engaging with their clients. And they had developed it over time, and it was connected to their personalities. So for instance, one of them was always a very good listener, but it was always about the story they were telling and making sure that the story evolved as the facts evolved. And then that story was often in a PowerPoint deck and was always available and always ready to be handed out in case you ran into a new stakeholder in the hallway. Or in case a meeting you're in with a bunch of folks referenced something that was tangential, and it wasn't part of the intended meeting, but you're ready to tell that story. And that story incorporates both the short game as well as the longer game to the extent that you know them.

That was one. And that was, I thought, very sophisticated and something that in more complicated situations, I definitely go to. Another one was actually far more basic, which is a person who just felt like, you know what, always stay super close to the client. Always stay close to the client. And have interactions that were not necessarily just about the work, but always knowing where the client was, and that really helped that person pivot as necessary.

Deb Zahn: That's right. And you'll find things out about them that reveal either new or different ways that you can add value to them just because you've had interactions besides the very narrow, specific thing you're doing for them. I love that. So any last words of wisdom that you would tell folks; again, professionals who are going to become consultants, a last piece of advice you would give them as they begin their journey?

Rajan Dev: I think we've already kind of talked about them. But they're so super basic, which is have empathy for your clients. Let your client know that you have empathy for them. And be committed to sharing facts. And you do those things, most other things you'll be able to learn on the job.

- Deb Zahn: I would agree, definitely. So let me ask you my last question, which I ask everybody because it's so important. So it can be hard, whether you're a client or a consultant, to have life balance. What do you do to bring balance into your life?
- Rajan Dev: Well, this one's hard because there's that philosophy of: Can you even have life balance when you are committed to being always on for your company, or a client, or et cetera? So maybe that's the first question of really looking at that hard, is that: Can I do what I'm doing in the way that I need to do it and actually have life balance? So is that a fallacy?
- Deb Zahn: I have my answer, which is no. But you have to be deliberate in how you make your choices.
- Rajan Dev: So that being said, if you are committed to doing this kind of work, then ultimately, you've got to be committed to care. And so that is the care for your loved ones, care for yourself, and care for your friends, maybe the next level out. Right?
- Deb Zahn: Yeah.
- Rajan Dev: And it's: How do you make sure that you're doing those things that ultimately A, make sure that you're in a balanced situation? But then ultimately fuel you to be doing this kind of work. So that also can manifest in other things for other people. And some people, it's not so much about relationships. Maybe I went to that because that's what's important for me. But for other people, it might be intellectual curiosity. Maybe it's about physical activity. Maybe, and probably for most of us, it should be about sleep. How do you make sure you're doing those things? Right?
- Deb Zahn: That's right. And if you want fuel, you darn well better be sleeping.
- Rajan Dev: Yeah. But it's basic. It's understanding yourself, understanding what you need to be your best self and to show up as your best self. And then know everything is a choice and a compromise, and to be mindful of it so that you don't have regrets.
- Deb Zahn: That's great. I love that. Well, and that's what I always say. It's all about deliberate choices, so that's really helpful. Well, Rajan, thank you so much. It was so helpful to hear both sides of the perspective because you've been both and obviously think really deeply about what actually works, so thank you so much.
- Rajan Dev: My pleasure. Great talking to you.
- Deb Zahn: Thanks so much for listening to this episode of The Craft of Consulting Podcast. I want to ask you to do three things. If you enjoyed this episode, or if you've enjoyed any of my other ones, hit subscribe. I've got a lot of other great guests coming up, and a lot of other great content. And I don't want you to miss anything. But the other two things I'm going to ask you to do—one is, if you have any comments, if you have any suggestions or any kind of feedback that will help make this podcast more helpful to more listeners,

please include those. And then the last thing is again, if you've gotten something out of this, share it. Share it with somebody you know who's a consultant or thinking about being a consultant. And make sure that they also have access to all this great content and all the other great content that's coming. So as always, you can get more wonderful information and tools at [craftofconsulting.com](http://craftofconsulting.com). Thanks so much. I will talk to you on the next episode. Bye-bye.