

EPISODE 26: A Client's Perspective on What Makes Consultants Excellent-with Kate Breslin

Deb Zahn: I want to welcome you to episode 26 of the Craft of Consulting Podcast. My guest today is actually someone I've known a very long time and she is going to give us the client perspective. I'm going to be talking to Kate Breslin. She is the President and CEO of the Schuyler Center For Analysis And Advocacy. And this is a nonprofit policy organization based in Albany, New York. And she's going to talk to us about what she likes best when she hires consultants. What makes her want to come back to them again and again. She's going to be giving advice about what not to do and how to handle it and when things change or switch up on the project or if something goes wrong. So a really great opportunity for you to get in insider perspective from a client about what they want to see and they don't want to see in consultants. So let's get started.

Deb Zahn: I want to welcome my guest today, Kate Breslin. Kate, thanks so much for joining the show.

Kate Breslin: Great to be here.

Deb Zahn: So let's start off. You are actually not a consultant. You are a client of consultants, which is why I wanted to have you on because it's always good for consultants to hear the other perspective to help guide them in the choices they're making. So let's start off, what type of work do you do?

Kate Breslin: I lead a nonprofit organization that does statewide policy and advocacy and we're based in Albany, New York.

Deb Zahn: That's great. And how do you use consultants? What do you usually bring them in for?

Kate Breslin: We've brought in consultants for several different kinds of things. Often it's for lobbying, so on issues that we're working on, sometimes we bring in additional lobbying help from contract lobbyists, even though we also are registered lobbyists. And then I've also brought in assistance for grant writing, for media-public relations, that sort of thing. So, typically when we're trying to sort of generate media attention to an issue. And I think that's it.

Deb Zahn: That's great. Well, so that's a lot. So let me ask you this. So what's the best thing that a consultant that you've hired before has ever done that just made you say, yeah, that's exactly what I'm hoping a consultant would do.

Kate Breslin: What I think I most appreciate is when a consultant can give me concrete tools that I can use right away. So I love having consultants identify what our problem areas are and that sort of thing. But really what's most useful to me is to help me to have some tools that I need to do the work that I need to do. So if that is working with me to help identify who's a good spokesperson for an issue, or

helping me to make contacts with media outlets that I haven't yet been able to make contact with. So typically it's something very concrete.

Deb Zahn: Yeah. And something that isn't just, well, if you need something else, hire me to do more. It's for you. For you to be able to take the actions that you want to take.

Kate Breslin: Yeah. Often I'm looking for a consultant to bring in expertise that I don't have in-house or that I don't have the time to organize my staff to get together.

Deb Zahn: Right.

Kate Breslin: And so, I'm looking for a consultant to kind of to listen to that, to hear what those things are, and to go beyond just saying, yeah, well you got to do this and this. But to really help me do it.

Deb Zahn: Yeah. Yeah. And I imagine there's consultants that you've brought back more than once, and what was special about them that you keep wanting to work with them?

Kate Breslin: So the people that we have brought back are people you know who (a) shown enthusiasm for the work. So sometimes you find the enthusiasm during sort of the pitch period or- [crosstalk 00:04:43].

Deb Zahn: Not good folks.

Kate Breslin: ... Yeah. It's hard to sustain. So the people that I brought back are people who sort of remained, or seemed to be committed throughout the project. Really had some palpable enthusiasm. And the ones who gave us sort of concrete tools that we could use as we move forward.

Kate Breslin: So, for example, developed, let's say, a media plan and strategy, but then also gave us some tools to put in the tool kit that we would use. So, you know, talking points for when we're meeting with people from the press and key points when you're drafting an op-ed, those sorts of things.

Deb Zahn: Yeah. Things that just right off the gate make your life easier.

Kate Breslin: Yeah. I feel like we have found consultants sometimes who help us identify our problems and then sometimes they'll say, well, you should really do this, this and this. And often I know I should have done this, this, and this. And what I actually need is someone to be a little more concrete and help me identify sort of what's the tool that I'm bringing, what's the product that I'm bringing to meet with this legislator or this media outlet?

Kate Breslin: And interestingly for me, I find it very helpful when the consultants have figured out a way to help manage me. Often the reason I'm not getting something done is because I haven't managed to carve out the time to do it and I'm busy managing a team. And so having somebody from the outside who is reminding me of my concrete to-dos, is actually very helpful to me. And I know that's a tricky balance because I also don't want the person to behave as if they're my boss. But it is very helpful to me to have somebody who I feel like is... That we're in it together. We're part of a team. And that that person is nudging me along as well.

Deb Zahn: That's great. Now, if someone's working with you and let's say something goes wrong or awry or, you have to switch something up, how do you want them to handle it?

Kate Breslin: I want them to let me know right away, but as I also say to my team, I really appreciate when you identify a problem or something that we need to be doing differently. When you identify a problem, what I'd like is a couple of ideas about how we can fix it. So, I definitely want to be told about what's going wrong, but I need more than that. I need at least some ideas for me to react to. So I don't have to generate that myself. So I want the person who had taken the time to say, I think we need to change course. Fine. And here are a few ideas about how I think we could go about that.

Deb Zahn: Gotcha. Gotcha. Well, let's also go back to, you mentioned when they're pitching to you, and that tremendous enthusiasm that they're often showing. So, what advice would you give, let's say, if you had a friend who's becoming a consultant and they're going to have to go out and pitch to people for the first time, what advice would you give them of how to do that well, so that at least, if it was you or if it was someone else, the person would say, okay, either yes or, yeah, let's keep talking and doesn't call security.

Kate Breslin: So in some ways it's not the similar from how I approach work when I'm pitching a potential foundation funder. I need to, you know, approach that funder in a way that makes that funder feel excited and enthusiastic about the work that we're going to do. And I need to kind of dream big. But at the same time, I need to be thinking about a year from now when I'm writing the report about the work. Am I relatively confident that I'm going to be able to say, yeah, we did this. And so as somebody approaches me around something relating to consulting, whether it's lobbying, or whether it's media, or whether it's somebody who's helping us with our grant writing, I'd like them to be enthusiastic but also be realistic about what they think. And I know that that's tough. I mean, I don't think it's easy. I think I struggle with it, as I said, even when I'm thinking about writing a proposal and meeting with a potential funder about work that we want to do. But the stress that comes from realizing that you over promised, can be paralyzing.

Kate Breslin: So I would say to the extent possible, have an open conversation about what you really think is realistic. And the other thing that I'm looking for is whether the people that I'm interacting with, the potential consultant, whether they're asking me questions. I want to know that they're asking me questions and that they're listening to the answer. So that I at least feel as though they're getting a sense of what our actual needs are.

Deb Zahn: Right.

Kate Breslin: I think often my experience is people get either nervous or excited and do all the talking.

Deb Zahn: Yeah.

Kate Breslin: And that as a purchaser of services, I need to know that the talking is coming from a place of having listened and learned about me and my problem or my challenge or my need.

Deb Zahn: Yeah. I always encourage new consultants to be really thoughtful in what their questions are so that it's obvious that you're really trying to get to the heart of what's going on. I hate generic questions like, hey, what keeps you up at night? Which anybody could ask, who doesn't know anything about you. As opposed to they know the world you're in, they know what you operate, they know what your initiatives are and the things that you're pursuing and how you define success, and they're trying to get to the heart of it so that they develop a deeper understanding.

Kate Breslin: Yes. Yeah. And I think that's hard, right? I mean, you need to really do your homework before you can engage in that kind of way. And doing your homework probably means the basics of looking at somebody's website and talking to them, but also problem with talking to other people who, who are like them or who know them.

Deb Zahn: Yeah. Or even, I mean, in the day of social media, there is going to be videos of, of people speaking or blogs that they've written or possibly podcasts they've been on or things that they're posting on LinkedIn that give you a flavor for not just what they're trying to accomplish but what matters to them. I remember before I was meeting with a potential client, I saw a video that he did and I liked the way he was talking about something so much, it got me really excited to work with him. And he could tell the difference when I was in the room because I wasn't faking it. I generally thought this guy gets it and I want to help him get to the place that he wants to get to.

Kate Breslin: And isn't that true? I mean, what'd you really want is that that connection with, you know.... Does this person have passion to do this work?

Deb Zahn: That's right. And that's where that fire in the belly you were describing shouldn't just be in the pitch meeting because if it suddenly gets doused and now you're just getting things off the shelf and you're just another client, I imagine you can tell.

Kate Breslin: Yeah. Yeah. I feel it as though I can tell when I'm feeling like we're just another client and like we're getting sort of the same spiel with a few different placeholder words that others are getting. And it's really demoralizing. And I have to say, particularly as a nonprofit organization where our resources are really stretched, and we are really tightly monitoring our budget. We are stretched trying to get our deliverables met for each of our grants. And so when we are contracting out, we are really doing it very intentionally to really, really meet a need that we said it's very important to us, and it's something that we're not able to meet internally. It's a hole we might not be able to fill internally. And so I really do want to feel like the person that we've brought in is committed to that part of it too.

Deb Zahn: Yeah, definitely. So if you've got a consultant pitching to you, what turns you off? And we've mentioned a little bit of it, but what would make you say, yeah, this is not going to happen?

Kate Breslin: I think one is, do I have a sense... I'll start with some of the obvious ones. I don't feel as though the person is aligned with our mission and our values. So, my organization works to shape public policy for people living in poverty, people in need. And so I certainly want to see some fire about those kinds of issues around serving vulnerable populations and making sure systems work. So, absolutely that. But I also think over promising. I can feel an over promise kind of quickly. And I think that now that scares me because what that tells me is there's a pretty good chance we're not going to be able to do what we think we're going to do with this person. So I'm very conscious of the over promise. And that's based on experience. I think it can be exciting at first and then you realize, oh, that really wasn't possible. My client should've gone up.

Deb Zahn: Yeah, yeah, yeah. Well especially because you're a nonprofit, too. So price always matters. Well, I would say value matters. So for the price you pay, that you can pay, you want ultimate value. So how do you handle consultants that maybe aren't used to working with nonprofits or just sort of miss the mark when it comes to a reasonable price for the value that they're talking about.

Kate Breslin: That sort of depends. I'd love to say that, if we're contracting out for something that we would go back and have a conversation with somebody to see if we could negotiate. And sometimes we do that. We say, listen, this is more than we're going to be able to do. So recently, we said this is an amount that we're not going to be able to do. But what could you do within a slightly lesser amount? Could we do it in a different time frame? Could we cut back a couple

of the deliverables? Those kinds of things. The reality is though, if we have a few different people putting forward a proposal, we're not going to call and have that conversation with every person. Some of them we're just going to have to say, let's just knock that one out.

Deb Zahn: Yeah, yeah, yeah. It's interesting because when you do have those conversations, for my listeners out there who haven't been in consulting or been in it long, you described the best possible scenario, which is a potential client says, could you reduce the scope to fit the price? What often happens is can you, for price, do the scope?

Kate Breslin: And that's what happens sometimes with grants, too. With funders. And I think that puts us all at a disadvantage.

Deb Zahn: Right. Now sometimes at the beginning of a project, particularly something as fluid as what you're doing or dynamic as, I should say, as policy work, where the scope, what you think it is at the beginning may not be what it ultimately is because you're going to have to be adaptive and switch things up to make it work. How do you want a consultant to be able to work with you knowing that the scope may be fluid?

Kate Breslin: Yeah, that's a good question. And frankly we've struggled with that because you'll hit it right on the head that because we're doing policy work, we're both sort of for or advancing policies that we think are important. And at the same time we're looking for open windows where an opportunity opens up that we think of policy that we're advancing, we have a special opportunity. But at the same time we're playing defense sometimes against policies that we think would be damaging or detrimental.

Kate Breslin: And so we are internally very dynamic, and I need to know that somebody that I'm working with is able to be flexible. And what I've realized is usually a weekly or every other week check in that's scheduled in addition to whatever else we need to do during the course of a project, a regular check in is, for me, very helpful. Because that helps to ensure there are fewer surprises. There will always be surprises, right? We know that. But there are fewer surprises if we have something scheduled and if it ends up being 10 minutes, because there's not a lot to talk about, that's fine. But in my case, usually about a 30 minute check in once a week just to say what's going on? Anything I need to know, anything you need to know. That's good.

Deb Zahn: That's great. And, and I think you hit upon something that's so critical, which is the communication piece. So other than the regular check in again, if you were giving advice to a new consultant, what would you tell them about communication?

Kate Breslin: I would say that similarly, in addition to that, the more frequently you check in... Well, no. Strike that. Not the more frequently you check in, but checking in frequently is useful. One of the reasons for that is it prevents that horrible thing that happens after it's been a few weeks and you haven't been in great contact and then something a little strange happens or something that makes you feel uncomfortable happens, and then suddenly you say, oh no, it's been like three weeks and I haven't been in touch. And now something bad has happened. And now it looks like it's been a long time and I haven't been in touch with the person.

Deb Zahn: Yeah, and now your next conversation is awkward or unpleasant.

Kate Breslin: You're going to have an awkward or unpleasant conversation if you've been in slightly more frequent contact than if you've had a long period of no contact.

Deb Zahn: That's right. And the truth is that for anybody, if you leave long gaps, people either forget about you or they fill in those gaps with their worst fears about, oh my God, nothing's happening.

Kate Breslin: Yeah. I think that's true. Again, in some ways it's not dissimilar from when you're working with a funder. I don't want to hug them, but I want to kind of keep just in regular context so that they don't forget about us and they know that we're doing the work.

Deb Zahn: That's right. Never make folks wonder. One other thing that occurs to me, particularly with young new consultants who, had professional careers previously, and so one of the reasons they would make a good consultant is because they know helpful things. But I often see with a lot of new consultants that there is a moment where the best thing to do is to be honest with a client up to and including telling them that they're not making a great choice. But there's a hesitancy to do that because I think consultants, some consultants, get a bad rap as being sort of yes people. And you can't can't honestly give feedback to the client. So I know you are somebody who accepts honest feedback because you want the best possible outcome. So I'm going to ask you, so I assume that's happened to you before where somebody had to say, hey, I don't think this is right. I don't think this is going to work. What's the best way for someone to do that?

Kate Breslin: So, yes, I do appreciate honest feedback and I have got... You know, I think that's been an evolution because sometimes it's tough to receive honest feedback. I think for me the best way for me to take that sort of thing is when it feels like it's coming from a genuine place. And when the message is conveyed in some way that, I'd rather you hear this from me, than you kind of step out in public and do this. So, I'd rather you hear this from me who is thinking about

you and thinking about your organization than have you show the world this thing that's going to be a mistake.

Deb Zahn: Right? And if they've already shown you that they care about the outcome and they care about what you do, I imagine that makes that conversation easier because you're not wondering are they just being contrary for the sake of it, or telling me I'm wrong for the sake of it, or is it really because they're drawn to making sure there's a good outcome and I'm protected.

Kate Breslin: Right. I guess everything kind of comes back to having a genuine relationships. I mean, I think that's true in life, but it comes back to that. Yeah, do I believe that this person has my best interest in heart? And I can only imagine, and having been there and in different ways, that giving that kind of feedback is hard, especially if you're in a consulting relationship. I know it's hard just when you're super busy or when you're speaking to your own manager about that sort of thing. But I think to the extent you can convey it in the way that this is because I think the most of you and your organization. I think that's the best way to go about it.

Deb Zahn: That's great. Is there anything, and again, thinking of... You probably have had this already, but if you have a friend say I look, I've done a bunch of cool stuff and now I want to be a consultant. Is there anything you would tell them flat out do not do this. When you are a consultant avoid this.

Kate Breslin: I think I would say be cautious about over promising. That would be my biggest one. Be cautious about over promising. Because in the end, for most of our work, whether it's consulting or anything, so much of the way we're going to get additional work and good work is by word of mouth. And so all the advertising in the world isn't going to make up for several people saying, oh, that person promised a bunch of stuff and just could not deliver.

Deb Zahn: You only need one or two. That say something about you before that becomes attached to your brand, whether you like it or not. And it works the reverse, too. So if somebody says something positive like I got exactly what they told me they were going to get. That also then attaches to your brand in a very magnetic way.

Kate Breslin: It's astonishing, isn't it?

Deb Zahn: Yeah, it really is. I've been fascinated to hear the few times where people who have come to me said, why came to you because I heard this about you. And they were things that I thought were true about me, but it wasn't necessarily what stood out in my mind. So if I was going to do a website or promote something, that wouldn't have been it. But that turns out to be what people... And it was one of those things where she cares more about the outcome than she cares about herself. And I thought, well, that's great. I'm glad that people are saying that, but I wouldn't have advertised that.

Kate Breslin: And it's interesting because how do you develop that?

Deb Zahn: Yeah. Well now I think about it. Now I'm super self conscious because someone said it.

Kate Breslin: And that gets to the whole, you know, back to you want people to ask questions. You want a consultant to really understand what is the outcome trying to get at. I might think I know what it is, but I do want somebody to kind of keep asking me that.

Deb Zahn: Yeah, exactly. And poking sticks at it sometimes if that's necessary to say, for your larger goal, is this outcome or this cluster of outcomes going to get you there because that's the real thought leadership. Not the, I'm telling you what to do, but I'm being a thought partner with you in helping you achieve your dreams.

Kate Breslin: Absolutely. Absolutely. Those, those interim points. Are these going to be the things that get you where you need to go and if they're not, let's think together about what is.

Deb Zahn: Yeah. Oh that's wonderful. I like that. So I have a final question that I ask everybody, including clients. And that is, so life balance is really important. It's important for consultants, it's important for clients. So what do you do to bring balance to your life?

Kate Breslin: I do yoga and I love doing yoga. I am always striving to find a little more balance like many of my friends and my colleagues. I think that I spend a lot of time thinking about the work that I do and part of the reason for that is because I'm really, really committed to it and passionate about it. I do yoga and I take long walks.

Deb Zahn: Oh that sounds wonderful.

Kate Breslin: It really is. What do you do?

Deb Zahn: What do I do? Well, I actually get really curious about the choices that I make that put my life out of balance. I am apparently tremendously creative in that regard and always looking for a new angle to throw things out of balance. So I stay really curious and I say... So I just said yes, you know, I'll give an example. So, I'll pay attention to... I'm drawn to say yes to something that I know if I say yes to that, it's going to mean less time with my beloved husband, less time with my mom, less time, cooking healthy foods, you know, the things that fundamentally bring balance to my life. And then I stop and I'm curious about why am I so drawn to that? Is it because I'm passionate about the work and

therefore it's worth trying to negotiate those other things or is there something else going on?

Deb Zahn: Is it because someone complimented me and said, hey Deb, you're the best person. Come do this. I look for my triggers with the intent of not being just carried away by them, but with the intent of pausing and deliberately making a choice, recognizing, as I've said on other podcasts, that all choices are relative choices. So when you choose to do yoga, you're choosing not to do something else. When I choose to work until 1:30 in the morning, which is only very occasionally I do that, there's a series of choices that led to that. Whether I was conscious of it or not. So I try and bring as much consciousness and deliberateness to my choices and understand when I'm saying yes, what am I saying no to? And when I'm saying no, what am I saying yes to?

Kate Breslin: I have always appreciated that about you and you do that as a colleague as well. So I appreciate that. I really do. I think that's part of what makes you so good at what you do and also so good at being a friend and colleague.

Deb Zahn: Aw, thank you. Because I do voice it a lot because, you know, God forbid I have an internal monologue. It's genetic. There's nothing I can do about that. Well Kate, thank you so much for joining me today. I can't tell you how great it would have been when I was first a consultant to hear this perspective from clients because when you first start you just don't know. You've never been in this role before. So hearing it directly from someone who is fair to consultants and thinks about sort of what a good relationship with them, is just so invaluable, I'm sure, to so many of my listeners, so thank you.

Kate Breslin: You're welcome. It's been fun.

Deb Zahn: Thanks so much for listening to episode 26 of the Craft of Consulting Podcast. I have so many other great episodes that are coming up, so don't miss anything. Hit subscribe and also feel free to leave me some comments and let me know what you think about the show and if there's any topics in particular that you want me to cover. And don't forget, you can always go to my website craftofconsulting.com. I have a lot of great information that's on there that can help you be a successful consultant and make sure that you get the life you want. Thanks so much. Talk with you next time. Bye bye.

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