



Inside this Issue:

*Message from
O&A President 1*

*From Technical
Wizard to Problem
Solving Consultant -
A Personal
Journey 2*

*Aligning Internal
I/S Consultants
with the
Business Areas 4*

Message from O&A President

Account Manager. Customer Relationship Manager. IT Client Liaison. Internal IT Consultant. Regardless of what they're called in your organization, these folks are IT's valuable eyes and ears into the business community. When they are properly selected, well positioned, and appropriately trained, these folks (and IT overall) build trust, credibility and good will. IT is positioned as a partner and is involved early in the planning process. IT's value proposition is understood and marketed strategically to all levels of the business.

In this issue of *Ouellette-Online*, we are pleased to share two client articles highlighting their organizations' efforts to conduct business more consultatively. Gregg Knoche of American Family Insurance provides interesting insights as to how to structure and build a successful internal consultancy. Rick Geise of Great Lakes Educational Loan Services shares some very tangible and personal perspectives on the value and power of internal IT consulting skills.

Although slightly different in their approach, both of these articles are based on a similar philosophy, mind-set and skill set that set these organizations apart.

We thank both authors and their companies for sharing their stories. On their behalf, I encourage you to contact them directly to network, share ideas and exchange best practices.

A handwritten signature in black ink, appearing to read 'Dan Roberts', with a long horizontal flourish extending to the right.

Daniel D. Roberts

Rick Giese is the Enterprise Development Center Planning Manager at Great Lakes Educational Loan Services, Inc. in Madison, Wisconsin. Rick is currently responsible for the development of Distributed Application Architecture standards, best practices, and processes across all of the development teams at Great Lakes. He has a Bachelor of Science in Computer Science from the University of Wisconsin – Milwaukee and a Masters of Business Administration from Edgewood College.

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From Technical Wizard to Problem Solving Consultant - A Personal Journey

I have been in IT for over 15 years and have played a variety of roles from Developer, to Lead Developer, to Technical Architect, to Project Manager and now Development Manager. I have worked as an employee for a large insurance company, as an external consultant and now as an employee of an organization that serves the student loan industry. Throughout this journey, I have witnessed quite a few good IT professionals and a few not so good ones. What has become apparent to me is that it is not the technical savvy that separates the good from the weak. It is their consulting skills.

Much has been written and said about the lack of interpersonal or soft skills in IT. Yet, we continue to crank Java or Microsoft .NET code until the wee hours of the morning and solve technical problems that seem insurmountable. But we have not mastered fundamental consulting skills, such as the art of communication. I was fortunate because early in my career, when I was still a *technical wizard*, I was exposed to the non-technical or human side of IT at an O&A IT Consulting Skills workshop. I believe this was one of those turning points in my career. I used this material as a consultant and continue to apply it in my role today.

Some people tend to think of consulting skills and consultants as equivalents, but they are not. I have worked with consultants who had a really solid set of consulting skills; however, I have also experienced consultants that had poor consulting skills.

Others believe that consulting skills are not as important for internal IT employees. This is another fallacy. I believe there is no distinction, no line between internal consulting and external consulting. Both parties want to best serve their clients by turning business requirements into business solutions. In fact, consulting skills are probably more important for internal IT units. An IT organization that does not have good consulting skills could find their clients shopping for external service providers.

IT's New Skill Set

Consulting skills are all those items that define the relationship between the IT professional and his or her client. It is written and verbal communication skills, being flexible and motivated, and demonstrating enthusiasm and

empathy. It is also the ability to really listen, generating options for success, and owning the communication. Understanding the role that you are expected to play in each situation is also critical.

Another critical consulting skill is knowing your audience. A few years back I was part of a team comprised of a Business Development Manager, another consultant and myself. We had an initial contact meeting with a potential client and we were at the point in the process when you are trying to understand the client's needs and build trust. We were meeting with two of the executive officers and were focused on demonstrating how our company could provide value from a project/engagement management perspective. Things went well in the meeting until the other consultant dove deep into data modeling theory.

My colleague clearly did not understand that company executives really don't want to be lectured on the finer points of technology. This led to an ugly conversation in the parking lot because he simply did not understand the audience. Ultimately, we did land some business with that client; however, I believe that the image that we demonstrated in that early meeting prevented us from becoming true business partners.

It is also important that IT professionals generate options for their clients to consider and evaluate. I was part of a project where the client had made it very clear that in the past they didn't think that the IT folks listened to them or provided what was asked for. To make up for past history, the project manager decided to simply give the client whatever they asked for even if it was detrimental to the final solution. It is critical that IT professionals trust their knowledge and intuition and provide different options and ideas to solve business problems. Without this approach, the ultimate solution will not be as good as it could be.

I believe there are two other critical consulting skills: interactive listening and owning the communication. Interactive listening is not just sitting back and taking it all in. It's clearing your mind of outside daily distractions and concentrating on what is being said, showing good body language and empathizing with the client. It's paraphrasing facts and presenting them back without overstating the obvious.

continued on page 3

**From Technical Wizard to Problem Solving Consultant -
A Personal Journey, continued from page 2**

**Items to Consider for
Your Consulting
Binder**

Consulting Section

- √ Consulting Cycle/
Engagment Roadmap
- √ Top IT Professional
Attributes
- √ TeamBuilding
Articles and Exercises
- √ Workshop or
Training Artifacts
- √ Project Management
Articles
- √ Leadership Articles

Business Section

- √ Business Plan/Client
Goals
- √ Strategic IT Plan
- √ Business Articles

Technical Section

- √ Project Artifacts –
Charters,
Requirement
Specifications
- √ Object Oriented
Analysis and Design
Articles
- √ Technical
Architecture
Definition
Documents

After completing a meeting in which you have exercised excellent interactive listening skills, things can still break down. The next step is to “own the communication”. You’ve emailed the meeting notes and clearly identified the decision points, but you haven’t heard back from the client. It’s easy to wait for the client to get back to you, but to be truly effective you need to go that extra mile. Follow-up with a phone call and if that doesn’t work try catching the client between meetings in the hallway. Many times the client is extremely busy and the project can slip off their radar.

One of the tools that I use to keep my skills sharp is a consulting binder (see sidebar). This 3-ring binder includes project artifacts and articles that I found particularly useful or insightful. Over the years I have added, removed and replaced items as my experiences changed and my work life evolved.

Some of the materials in my binder are from the O&A IT Consulting Skills workshop. When I find myself or a member of my team in a new or difficult situation where I need some guidance, I turn to my binder. I’m sure we all have those project artifacts and reference materials that we find extremely useful. Rather than losing these valuable items I encourage you to organize them in your own consulting binder.

Leading the Journey

As IT professionals, we work in a project-based environment. Those of us who have earned the privilege to manage projects also take on the responsibility of actively demonstrating and developing the consulting skills of our team. The project manager must lead the journey by mentoring and coaching team members. They need to look for those learning opportunities and show courage by having those adult conversations we all avoid with clients and colleagues.

So what distinguishes consulting skills used by project managers from others on the team? I believe the answer is *leadership*. John C. Maxwell is a leading authority on leadership and author of the book [The 21 Irrefutable Laws of Leadership](#). Maxwell’s sixth law of solid ground provides insight into the role that project managers need to play in reinforcing consulting skills.

To build trust, a project manager must exemplify consulting skills, meaning that all his or her actions must be on solid ground. Taking this approach will not only build trust within the project team, but will also build that all-important bridge to the client. PepsiCo chairman and CEO Craig Weatherup states, “People will tolerate honest mistakes, but if you violate their trust you will find it very difficult to ever regain their confidence. That is one reason that you need to treat trust as your more precious asset. You may fool your boss but you can never fool your colleagues or subordinates.”

Building Trust - Building Bridges

Ultimately, solid consulting skills will result in building bridges between IT and the client through trust. Trust is money in the bank, that deposit an IT professional needs for those days when things don’t go as planned. We all understand that IT can be unpredictable and there is going to be that day when you have to bring bad news to your client. Having built up trust by demonstrating solid consulting skills will go a long way to taking some of the bumps out of the road when that day comes.

Some people are just born with solid consulting skills. They can clearly evaluate situations and determine just the right thing to say or do. They have the innate ability to connect without any awkward pauses. I consider these folks to be the naturals. But, I’m not one of these folks, I’m not the natural. When I was a freshman in high school my band teacher gave me a poster with the slogan “The race does not always go to the swift, but to those who keep on running”. This is a lesson that I’ve tried to use my entire career and I think it is an appropriate credo for any IT professional.

Whether you’re a natural or working hard to expand your consulting skills or ability, I wish you a successful journey.

Gregg Knoche has over 22 years with American Family Mutual Insurance and has served in a variety of capacities during his tenure, including Manager of the Information Center, Manager of the Development Center and Director of Applications Development. He is currently Director of the I/S Consultancy.

For more information about what American Family is doing – or to share your ideas and successes on what's working with your consultants/ account managers – contact Gregg at gknoche@amfam.com or (608) 242-4100, ext. 30173.

Aligning Internal I/S Consultants with the Business Areas Results in a “Win-Win”

At American Family Mutual Insurance Company, the nation's fourth largest mutual property/casualty insurance company, the Information Services (I/S) Division has stepped up to the plate to play a participatory role in how the Company positions itself for the future. American Family's I/S Division has approximately 1,050 full-time employees and a variable number of contract employees (depending on workloads and the type(s) of projects underway).

The Division operates as a business-within-a-business whereby each department has a unique set of products and services it sells. The division is organized into the following I/S departments: Consultancy, Application Technology, Base Technology, Client Services, Machine Service Bureau, Computer Technician Services, Enterprise Technology Strategies and the I/S Business Office.

“We have a fairly large I/S Division, and I credit our structure for enabling us to operate very effectively,” says Gregg Knoche, director of Consultancy for the I/S Division.

The purpose of the I/S Consultancy unit, which began operating in February, 1999, is to align internal technology consultants with the Company's various business and service areas. This combination provides the business units with a strategic partner who can offer ideas and suggestions on how their area could deploy technology effectively. The I/S consultant provides the business areas with insight to the Company's existing IT resources, capabilities and options for leveraging technology to meet their business needs.

The unit has a staff of approximately thirty. It is a blend of former application development management, former management from the business units, and finance. These individuals all possess strong planning, facilitation, and mediation skills, they have the ability to speak the language of technologists and clients, and be problem solvers.

In addition to the advisory role they play with the business areas, American Family's internal I/S consultants work in the following capacities:

- Serve as the marketing arm of the I/S Division to communicate success stories.

- Identify opportunities to reuse solutions throughout the Company.
- Help facilitate the Company's planning process relative to I/S projects and facilitate I/S priorities as conflicts arise throughout the year.
- Assist the business areas with budgeting relative to I/S.
- Define the business requirements from which the technical staff work with clients to define system specifications.
- Gain corporate support for enterprise-wide technology purchases.

This component to the Company's I/S structure has resulted in a strong partnership between I/S and the business areas – and has generated a number of innovation wins for the Company. “With the work of the consultants we were able to gain corporate-wide support for the purchase of a product that has been pursued for most of my career at American Family. We have also been able to garner corporate backing for new telephony and analytic technologies,” says Knoche.

Serving as I/S account managers, the consultants are able to understand the clients' business, perform account reviews, identify strategies enabled by technology and define the business requirements for new systems and solutions.

The Consultancy has been well received from the start. Surveys of clients over the years have shown that our services are of value. These surveys also show that the clients' need for services change from year to year. In the beginning, assistance with their budgeting and requirements was important. Today the clients are looking for research on what others are doing with technology and identifying new business opportunities by using technology strategically.

“The Company's business units view the I/S consultants as strategic partners who are vital to their success. We've reached a point where they're looking to us for ideas and suggestions – and we're very proud of that accomplishment,” says Knoche.