



# The Eight Universal Rules of Engagement Management

In working with clients in the delivery of professional services, it is imperative that you have a process that outlines how client work should be carried out from inception through final completion. It is insufficient to simply state, “The work is done when the client runs out of money!” This process requires the following eight universal rules of engagement management that need to be followed in order to be successful.

## Rule 1. Maintain Consistency

The ideal is to identify and appoint a central contact professional who will serve as a liaison to the client. This individual provides not only continuity and consistency to the client over time, but he also is the main communication link that handles all aspects of planning, scheduling, and the management of perhaps multiple engagements.

## Rule 2. Have a Process-Driven Approach

Understanding where to go with things is a universal precept. Professionals who are delivering services need to be well-grounded in understanding all of the process steps—from promoting to qualifying to committing to delivering services. Many client-failed projects can be tracked back to consultants who didn’t follow a consistent process throughout the engagement. Having a baseline engagement process model provides everyone, including the client, with a level playing field.

## Rule 3. Be Clear as to Ownership

Knowing who has what role at the

various levels of the client relationship is a key component of engagement management. Having a clear sense of who “owns” what parts of the engagement is important. Within this context, consider three specific roles:

1. The overall **client relationship manager** who maintains the long-term perspective and global management of the account.
2. The **specific project manager** who oversees a single project with a client to ensure that the work is carried out according to plan and agreed-upon expectations.
3. The **designated consultant** or consultants. The “brain trust” that helps solve client problems and builds relationships every day on the job.

Rule 4. Utilize Performance Tools Properly designed performance tools improve the quality of work. Everyone on an engagement needs access to tools, templates, and checklists to maintain the quality of the project as well as to speed completion. Below are 20 specific tools that should be part of your overall engagement process:

1. Account Planning Template.
2. Qualifying Client Checklist.
3. Proposal Template.
4. Change Impact Assessment Template.
5. Joint Responsibility Matrix.
6. Risk Analysis Form.
7. Issues Management Log.
8. Client Expectations Matrix.
9. Project Launch Checklist.
10. Project Management Tool Kit.
11. Project Status Reporting Form.
12. Staffing Skills Matrix.
13. Client Relationship Map.
14. Progress Meeting Template.

15. Project’s Integration Template.
16. Quality Review Checklist.
17. Project Wrap-Up Checklist.
18. Account Expansion Map.
19. Client and Team Evaluation Form.
20. Knowledge Management Engagement Lessons Learned Form.

## Rule 5. Integrate Quality Controls

By this time, most organizations have a quality process, be it the Malcolm Baldrige Quality Framework, Deming, Juran, SPQC, or some home-grown hybrid system. The bottom line is that it is difficult to preach quality of delivery if you don’t have a process yourself that everyone follows. Having an initial quality plan as part of the initial engagement management process ensures that problems are identified early and resolved in a manner that is consistent with defect-free work, prevention, and continuous improvement—“The Three Pillars of Quality.”

## Rule 6. Use a Knowledge Management System

Without exception, if you do not have a knowledge management system for your professional services organization, you are headed for trouble. Knowledge workers need information that is easy to obtain and user-friendly. In an effective knowledge management system, all relevant information is captured and available anywhere, anytime, by anyone who needs to know.

Your professional services knowledge management systems should include: best practices, tasks packages, methodologies, case studies, project lessons learned, tools, templates,

checklists, process maps, industry and client data, client profiles, and executive bios, to name a few.

### Rule 7. Commit Everyone to Obtaining New Business

In the world of engagement management, everyone, including the technical folks, contributes to getting new, “good” business. All consultants and support staff should have had some level of business development skills training. Everyone should be able to state a 30-second value proposition speech on an elevator with a C-level client. Everyone should fully understand all of your service offerings, be capable of asking the right qualifying questions, and be more than “dangerous” when it comes to proactively attracting new, good business. An example drives this point home:

In a three-month project, Max the consultant did exactly as he was told and contributed to getting the systems integrated on time, up to quality, and within budget. Making friends with his client counterpart during the engagement, Max learned that two other larger divisions of the company were

facing similar challenges to the ones they were working on. Max never asked his friend for more information, never mentioned the opportunity in a project meeting, nor e-mailed anyone about the opportunity—that was not his job. These projects (and several hundred dollars of revenue) went to a competitor. No one else in Max’s services business learned of the projects, and a couple of easy sales possibilities were lost. Sound familiar?

### Rule 8. Implement Effective and Efficient Project Management

Much has been written over the years as to what is meant by project management. So a rehash of all the tools, processes, and steps serves little purpose. However, there are four key success elements that are often overlooked in services projects that bear mentioning:

1. A dedicated project manager and dedicated project management team should be in place.
2. The project manager should select the project team.
3. All projects should have a clear

beginning and ending with performance milestones along the way.

4. People who will deliver the project should be part of the committing process.

### Conclusion

The Universal Rules of Engagement Management ideally should be framed against known best practices that support the project management process, scope, creation of a common methodology, appropriate selling skills, account management capabilities, knowledge of the services industry, knowledge of the business issues of the client, and an understanding of process consulting. Spending time building new skills and capabilities in all of these areas is well worth your time and effort. ♦

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