7 Essential Tips
for Evaluating Your Consulting Clients' True Needs

No matter your area of expertise, your clients' needs are likely to have changed in light of recent economic shifts. If you haven't adapted your consulting firm's focus accordingly, you could be failing to offer the best service options or match clients with the best consultants.

Here are seven practical recommendations for aligning your team's strengths with what your clients need from your firm.

1

Create a standardized intake procedure.

Learn everything you can about your clients when they first sign on with your firm — and implement a standardized process to collect the same types of information about each. To make this as simple as possible, use survey software that integrates with your CRM and has secure file storage capabilities.

2

Ask about clients' internal processes.

While your consultants may be in the habit of diving right into the big roadblocks a client is facing, it's just as key to understand what their day-to-day processes look like. Identify opportunities to apply simple solutions such as introducing a more user-friendly calendar software or reassigning one major responsibility. Sometimes, solutions are reachable enough to facilitate quick wins that show immediate value.

3

Record estimated vs. actual tasks completed for each project.

When you start a new project, it's safe to assume there will be adjustments to individual tasks. Rather than considering them one-off changes, analyze the entire scope of actual tasks performed and compare it to the original estimate. This is valuable information to share with clients, as it demonstrates the true level of work you've provided. An estimated vs. actual analysis also provides valuable data for internal decision-making.

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Engage in regular check-ins with clients and ask them to clarify expectations.

Your clients' expectations are yours to manage, but that doesn't mean they won't secretly expect something you haven't promised. Clarity of communication throughout every project is a must if you want recurring business.

Keep detailed meeting minutes to record each promised deliverable.

Taking — and centrally storing — accurate notes is critical to building a historical picture of client needs. New patterns in their requests could prompt a reevaluation of the kinds of consultants you might need to bring on in your next round of hiring.

Track employees' time to determine the types of skills they're using most.

Use accurate time-tracking software to investigate real-time allocation. What do your consultants end up doing that they or their managers don't anticipate, and does this keep happening? The answers can help you more efficiently satisfy this client and onboard similar ones down the road.

Provide itemized invoices.

Not only should a client know exactly what they're paying for, but your leadership team can use detailed invoices to analyze how well your provided services align with the original scope of work and the services you intend to provide.

Executing all of the above is straightforward with Accelo. Evaluate how our platform can help you better understand your clients' evolving needs by signing up for a free trial.