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How to Succeed in Consulting

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ABSTRACT

Maybe you are an awesome programmer working on a company's internal consulting team, but you have a hard time getting work done by the deadline. Maybe you are a strong SAS® developer who does independent consulting, but clients get upset when changes they ask for cost them more money. Just because you're good in the technical skills doesn't mean that you can succeed as a consultant. This presentation will give you tips on how to do just that. With a combination of project management and consulting skills you can go much farther, whether it's doing internal consulting, independent consulting or working for a consulting company. This presentation will be good for people who want to do better at managing the world outside of their code.

INTRODUCTION

A movie came out in the 60's titled "How to Succeed in Business Without Really Trying." Based on a Broadway show which was based on a book, it follows "a young, ambitious J. Pierrepont Finch who, with the help of the book *How to Succeed in Business Without Really Trying*, rises from window washer to chairman of the board of the World Wide Wicket Company." [Wikipedia] The book recommends strategies, tricks and deceptions so that Finch can climb the corporate ladder. In the end, though, he succeeds because he's honest about who he was and he looks out for the other executives.

This paper will not be a musical, nor will it recommend any deceptive practices. Instead it brings in strategies, methods and techniques from other areas: Project Management, Software Engineering, Professional Consultants and Personality Typing. Each of these areas (except the last) is a field that has its own skills and methodologies that help practitioners succeed. This paper will draw a few things from each as examples of what you can learn from them. It will not exhaust all of the beneficial practices they offer and the reader would do well to learn more about each. It's also not necessary that the reader learn everything that these disciplines offer, unless they are interested in branching their career into those areas. If a SAS Programmer wants to also manage projects, then, by all means, learning everything about Project Management will be important. However, if SAS Programming is where the heart is, then learning some project management techniques and tools will be sufficient. This paper gives you a head start on doing that. By learning something in these areas, the reader will become a better consultant.

We are all consultants

Now the reader may be objecting, "Darn it, Jim, I'm a programmer, not a consultant!" That's okay. These techniques are really for anyone who does work for another person. They could be your manager or a client. The clients could be colleagues in the same department as you or in another business unit. Maybe you have your own business and work via a 1099 for some company. Or maybe you work for an actual consulting company and are part of a team supporting a client. In all of these situations you have a client, someone who is looking to you for your expertise in SAS, data, statistics or related areas.

PROJECT MANAGEMENT

Project Management is a very mature discipline. There are many organizations to support it, the biggest one being the Project Management Institute. They have developed the Project Management Body of Knowledge (PMBOK) to codify the standards of terminology and processes to perform the work. A project "is a one-time job that has a definite starting point, definite ending point, clearly defined scope of work, a budget, and is multitask in nature." Some people get to work on a project team and have a good project manager working with them. There are ways that people on the project team can work and things they can do that make everything go more smoothly.

On the other hand, if your job is an ongoing set of tasks, you may not have worked on formal projects. Even if you have, you may not have had a formal project manager working with you. Some companies don't do project management well or even at all. Even in these situations, it can benefit you to learn some of the project management processes and skills. You don't have to implement them formally to benefit either.

The PMI says that project management processes fall into five groups:

1. Initiating
2. Planning
3. Executing
4. Monitoring and Controlling
5. Closing

The institute also notes that project management knowledge draws on ten areas:

1. Integration
2. Scope
3. Time
4. Cost
5. Quality
6. Procurement
7. Human resources
8. Communications
9. Risk management
10. Stakeholder management

While all of these may be relevant, there are a few that are more relevant to the consultant who does not normally have to do project management. They are Scope, Time, Quality, Communications and Risk Management. This paper will focus specifically on Scope, Time and Communications Management.

Scope Management

One of the biggest problems that a consultant can have is in defining and controlling scope. Scope is "the extent of what a project will produce (product scope) and the work needed to produce it (project scope). A Guide to the Project Management Body of Knowledge (PMBOK® Guide)—Fourth edition mentions it is the sum of the products, services, and results produced in a project (Project Management Institute, 2008, p. 440). It is often documented using a scope statement and a Work Breakdown Structure (WBS), which are approved by the project sponsor."[1]

Scope, Schedule and Budget are the triangle of project management. Changing one automatically changes one, or both, of the other two. When the scope is not adequately defined, the consultant is entering a hole of unknown size and depth.

When the scope is not well defined, the consultant doesn't have a specific endpoint that they are driving to. They may think they have completed the requirements, but the client has something else in mind and will not be happy with what is delivered. Not until the consultant eventually gets the scope under control will they successfully deliver what the client is looking for. The longer it takes to do that, the more time is likely to be wasted.

It's clear that understanding and managing the scope is important in every task and critical when you are in consulting. Even agile project management requires strong scope management. The first piece is to have a well-documented scope that defines what you are trying to achieve. Work with the end user/client/boss to define the requirements so that what they want is well understood. Then create a design document, mockup or use case description. These allow the end user to review and approve what the consultant intends to deliver. Some documentation of that approval is important. It could be a signature or just an e-mail.

As the product is being developed, or the task is being completed, the consultant has a target that they are working towards. They have a checklist, if you will, that both the consultant and the client can use to determine if the work is complete.

During the course of work, something could come up that requires the scope of the work to be changed. It could be an unforeseen technical difficulty that has to be worked around, or the client could have changed their mind on what fields they want in the data set. Those changes happen all the time and should be expected. If the original scope is well defined, then the fact that the new event is a change to that scope will be clear. The consultant can handle the effects through Change Control.

Change Control is the means by which you analyze a change request, i.e., evaluate the options available, calculate the impact of that change to schedule and budget, present the choices (options and impacts) to the client and let them make the decision.

Consider this example: suppose that you are creating a statistical model for the owner of a movie theater chain. You have a documented agreement with the owner that you will be predicting theater attendance based on type of movie, weekend of the year and a list of other potential factors. After thinking about it some more the client asks you to add weather data into the model. Without a specific list of potential factors, they could argue (and some would) that it's obvious that weather data should be part of the model. You could argue back and refuse to include it, but that's not a good way to make clients happy and get new business. Or you could submit to the client's demands and include weather data, which could well take a lot of time to prepare for analysis. In this scenario, you would likely end up losing money on the project, if you have to deliver the new scope for the same money. Even if not, you could have a lot of rework and/or miss the expected completion date.

Instead, with your well-defined scope and a documented agreement on the list of factors, you can do the following:

1. Evaluate the options available, in *collaboration with the client*. These might be
    a. Not include the new data
    b. Include weather data that likely requires you to do a lot of work preparing it for analysis
    c. Buy weather data that is already cleaned for analysis
2. Calculate the impact on schedule and budget

    a. No impact
    b. X number of weeks to prepare the data costing $Y for your services
    c. Pay $Z for the data and extend the schedule by W days
3. Present these options and impacts to the client *for discussion*. The client can select one of those options for you to pursue. Their decision would be documented and you would move forward with the project content.

In summary, Scope Management can be thought of as getting signed documentation (of whatever sort) of the scope (what you will deliver) and processing change control when that scope changes.

Communications Management

It is now cliché to say that in project management, the three most important things are "Communication, Communication, and Communication." Since it's cliché we won't bother saying it. :-)

Communication is critical to a good relationship and successful consulting is definitely about the relationship. For a Project Manager, one of the first things to do is to develop a Communication Plan. This plan defines Who gets told about What When and How and by Who. The Project Manager often has many stakeholders and these plans can get very complicated. For the consultant, the stakeholder is usually the client (could also be your boss) and the communication plan becomes simpler, though no less important.

For successful consulting, communication with the client begins even before they start paying you and continues even after the work stops. It occurs whenever anything changes and when everything stays the same. You tell the Point of Contact at the client and everyone else. You make sure you are transparent, but not too much. You never want to surprise the client, unless you were surprised, too, and then you come with options. Some of these points we'll address below in the Professional Consulting section. For now, let's look at Project Management.

Before the work

Before the work starts, you communicate with the client about, among other things:

- The Communication Plan – Tell them who are you going to update, how, when and what. The client will feel more comfortable if they know that you are going to keep them updated on your progress and any obstacles that may occur.
- The Scope Management Plan – Tell them what will be done to get their approval and how you will manage any changes that may occur
- The Project Schedule – Tell them when you expect to have deliverables done (including the very important interim deliverables), and what is required of others (including them) to complete those deliverables and by when. The latter is called the dependencies. Don't assume that these are obvious.

During the work

During the work, you follow through on the communications you defined in the beginning. It is important to be clear, factual and complete in your communications. Again, don't assume anything. There are broadly two types of communications: Status Reports and Ad Hoc.

Status reports should be regular, even if the client thinks they don't need them. These are both updates and CYA documents. The status report should at least include

- Work Period
- Audience
- Tasks Accomplished
- Task to be done next
- Obstacles, dependencies and issues
- Decisions made

It may seem counterintuitive to having a happy client to list out Obstacles, Dependencies and Issues, but they can be critical. You want to bring up problems as early as possible, so that everyone knows about it and a solution can be found. At the same time, it would be good policy to discuss the obstacles and issues with your client before they are documented, so that they aren't a surprise.

The status reports should go to your point of contact, but to other stakeholders as well. This could include their internal customers, their boss, other members of the team, your boss, and your sales person. Everyone who has a stake in the success of the project should get it, which provides you two benefits: CYA and business development. First, your point of contact can't control the narrative for others at the client. If they are the only conduit for information, then they can throw you under the bus when something goes wrong, even if it's their fault. Second, when others see how good you are at communication, managing problems and, of course, completing the work, then they will want you to work for them.

Ad hoc communication happens all the time in relationships. They ask for some data and you provide it. You ask a question about their request and they answer. Keep documentation of all of these requests and answers. Suppose they ask you for that data set verbally and you send it in an e-mail. Include in the text of that e-mail, documentation of the request: when it was made, what was it for and any conditions or constraints on delivery. For example, it might be something like, "Here is the data you requested over the phone on <date>. This data does not include the new records that you received yesterday as they have not been processed." You may have told them that over the phone, but when they do some "preliminary" calculations that get used by someone else to make decisions that cause someone trouble, they may or may not remember that you said that. Documentation is your friend.

After the work

Once the work is complete, the successful project manager, and thus the successful consultant, wants to close the work out well. They want to make sure that this work doesn't come back to bite them later and that it generates more business. To achieve the first, you want client acceptance of the work we've done. This could be as large as a formal Project Acceptance Document or as simple as an e-mail saying, "I agree that everything is complete." Or words to that effect. If the client has not agreed that everything is complete or if it was only verbal, then they, or someone else like their successor, can come back and ask for more work after everyone thought the project was complete, and without wanting to pay for it.

To generate more business, you also want written kudos from them. Again, this could be formal or casual, but it needs to be documented and approved. They may write a paragraph up for you, if you ask them. They may just say in an e-mail, "Thank you for your hard work and the great job you did." If they say that in a conversation, then you can ask them to put it into an e-mail, or you can send them an e-mail with the comment and ask if you can use it later. However you do it, it's important not to quote them without their approval. Maybe you could do it anonymously, if they are not comfortable or if their company won't allow it.

In summary, communication is the most important part of a consultant's work. Keep your clients up to date and document everything.

SOFTWARE ENGINEERING

The field of software engineering, or software development, may be the closest to what we (statistical programmers, statisticians, data scientists, etc.) do, and recommends many methodologies for doing it better. There is a lot that can be learned about good programming practices, error checking, regression testing, and more from the field, even if you are writing a so-called one-off, ad hoc program to fulfill a one-time request by a client.

For this paper, we will consider two best practices from Software Engineering that will help you to be, not better programmers, but better consultants: Defining Requirements and Estimation.

Defining Requirements

We have already discussed Scope Management and good Scope Management requires good Requirements. Some might even say that the scope is the requirements. So, how do you determine the requirements? Ask questions. Write down the answers. Make sure everyone understands and agrees.

- Gathering Requirements – The first step is to ask questions about what the client wants. This may sound easy, but it often isn't. Sometimes they don't know what they want and sometimes what they want changes. If it's a simple request and they can answer your questions well enough to fully define what they want, then that's great. If not, there are a number of techniques that you can use.
    - One-on-one interviews: Like the simple request just mentioned, interviewing the stakeholder(s) can be a straightforward way to get the requirements.
    - Group interviews: A group interview, or more than one if there are more than, say, four or five stakeholders, can save time and make it easier to reach consensus on requirements. Strong facilitation is necessary when there are disagreements among the stakeholders.
    - Surveys: Surveys can be good as the first round of questions. Often there will need to be some sort of facilitated session afterwards to fill in gaps and clear up confusion or contradiction.
    - Brainstorming: It may be that the stakeholders don't concretely know yet what they want. A brainstorming session can be helpful to elicit the requirements, especially if they are hoping for an innovative solution.
    - Shadowing: If people can't, or don't have time to, explain what the requirements are, then shadowing them while they work can be helpful. Even if they have given you a good first pass of the requirements, shadowing can bring out requirements that they didn't realize existed.
- Documenting Requirements – As the questions are being answered it can help with stronger elicitation to document the requirements for review. The documentation can be a bulleted list, a prototype or mockup of the end product, or use cases describing how the process will work. The form will depend on the type of end product. This documentation allows the stakeholders to

think through what they are asking for from another perspective. It verifies that you heard and understand what they said, and gives them an opportunity to clarify or change their mind once they see what the end product looks like in practice.

- Getting Requirements Acceptance – After the requirements have been documented and everyone agrees on what they mean, then it's important to get the client's sign-off accepting them, either with a formal signature or an e-mail or something in between. This step may be the same as getting sign-off on the scope, but it may not. Either way, the reason for getting a statement of acceptance is the same. They can't change the requirements without change control, which allows you to make changes to the project in an orderly way and, more importantly, get paid for your work.

In summary, as we said before, ask questions until you understand. Write down the answers to make sure everyone understands and agrees. Then get their approval.

Estimation

Estimation of the time it takes to complete a task can be one of the hardest parts of any project. What problems will you find in the data? Which variables, if any, will turn up significant? Even if no bugs or obstacles show up, then estimation is still hard if it's a new task.

Estimation is clearly necessary for most good consulting relationships. If a client asks you to do something, they usually want to know when it will be done, and they always want to know how much it will cost them. Both require good estimation so that they aren't unhappy and you get paid for all of your work. Some tips to help with estimation are:

1. **Understand the task well:** You can't estimate what you don't understand.
2. **Break the work down:** You don't want to estimate tasks in months. The chance for being wrong is much greater. Break the tasks down to at most a week of work. This can also help with #1.
3. **Use checklists and templates:** These tools can help you think of everything that needs to be estimated.
4. **Estimate with a range:** What's the worst case and best case? Using the ranges is more realistic. You can update the ranges as you get into the particular task and know more about it.
5. **Don't be overly optimistic:** Especially if it's a piece of work that is new to you, don't assume that it will go smoothly.
6. **Don't be pressured to hit a deadline or meet a budget:** Unless you are willing to work long hours or work for free, be realistic, honest and assertive about what it will take to do the work. Trying to please the client now with unrealistic estimates won't please them later when you miss the deadline.
7. **Include buffer:** Start with your best estimates and then include some buffer or contingency in case something goes wrong. Keep it at the task level so that it doesn't get lost.
8. **Be clear about assumptions:** List out the assumptions you had to make in order to get the estimates. These can be bullets, or calculations in a spreadsheet, or both and become part of the scope. Your client may correct some of the assumptions and that's good. It gives you more information and thus a better estimate. Then if the assumptions change, you can process change control and your estimates can change.
9. **Include everything:** Don't forget the "trivial" things, like meetings, responding to client e-mails, creating deliverable packages, travel time, etc.

10. **Stick to your guns:** Don't cave in to pressure to change your estimates. If you are clear about how you calculated them, then "sharpen your pencil" on the assumptions for clarity, not on the estimates.
11. **Understand priorities:** It may be that the estimate is bigger than the budget allows. In that case, discuss the priorities with the client. What are the lower priority items that you can remove from the scope to reduce the price?

In summary, break the work down to create defensible estimates with clear assumptions that you will be able to stand by, but negotiate if needed.

PROFESSIONAL CONSULTING

People who have done professional consulting for a long time know that success comes much more from the soft skills than the technical skills. You may be an excellent programmer, but if you can't manage the client, then you don't want to be in the business of consulting for long. On the other hand, if you take control from the client, then you won't be in the business of consulting for long.

Manage the Client

Consultants have very little power or authority over their clients. They can't manage them in the way a boss might manage an employee. In fact, since they are the ones paying, the situation is exactly the opposite. The client has the authority. Even so, there are two sources of "power" that you do have and can build on. First, the consultant is the expert in whatever they have been hired for and knows what is best. Second, the consultant has the power of the relationship. When the consultant has a positive personal connection with the client and the client has an affection for the consultant, then they can trust each other and that gives the consultant a form of power that they can build on.

There are two reasons why you would want to manage the client. First, for your own benefit. For example, if the client has unreasonable expectations before the project even starts, then they will be unhappy with your work when the project ends, and you could get fired or not be brought back. And if the client does not do their part in the consulting engagement, then you can be set up to fail.

Second, you learn to manage them for their own benefit. People don't always make good decisions. Sometimes people get very busy and forget things. This goes for clients and, never forget, it goes for you, too. Because of this, consultants have to manage them in order to help them achieve their goals.

Managing the client is definitely easier if you have a good relationship with them where they see you as the expert and trust you. If you have lost either of those, you may finish the current piece of work, but they will likely not ask you back.

In some sense, client management has already been discussed above in the project management section. By managing well the work that they want you to do, then you are also managing them. To emphasize the point, here are some of the key project management recommendations from before.

1. **Get them to approve and sign off on requirements and scope.** If clients are uncertain about what they want or changing their mind all the time, it does no one any good.
2. **Be up front about how you handle change control.** Some people are afraid of change control, but it is a positive thing for projects. It helps keep the project on schedule and on budget.

3. **Provide work estimates with ranges.** Giving the high end of the estimate can deflect unreasonable expectations.
4. **Be clear about assumptions and dependencies.** Part of managing is giving the client the information they need. If success of the project depends upon them taking some action, then let them know about it early and follow up on it.
5. **Keep them updated on risks, issues and decisions.** Even, or especially, if the risk or issue is because of the client. Obviously, diplomacy and tact are important, but they'll thank you later.

These points fall into some broader categories that are always good to keep in mind.

- **Under promise and over deliver:** It should be clear that the opposite is deadly to your career.
- **Communicate, communicate, communicate:** Obviously, don't nag. Do it in the right times and in the right ways (see personality types below).
- **Be honest about your communication and validate their understanding of it:** You can't manage the client if they don't understand you or don't trust you.
- **If you don't know, ask.** This was true in the beginning with requirements and it's true all the way through. It's especially important to ask how it's going? Silence is not always golden.

In summary, you often need to help clients help themselves. Even if they are on top of their game, these behaviors help you to have a successful engagement.

Give the client control

At the same time, managing the client does not mean manipulating them. It also does not mean taking on more responsibility than you should. If the client isn't making an important decision, then do you do it yourself? That road leads to danger. If you make the decision and things go awry, now it's your fault. Or maybe there were good reasons why the client hadn't made the decision yet, but you didn't know about those reasons. In the end, it is the client's project. They are the one paying the money. Therefore, they get to be the one with the ultimate control.

There are many points along an engagement path where decisions need to be made. Whether to hire you, what to have you do, what the schedule should be, what to do when something goes wrong, etc. Your client may give you the responsibility to make certain decisions along the way. That can be good. There are certain ones that you should not take.

- **Requirements and Scope:** You can help define these, but there should always be sign off by the client. Sometimes it can be a simple e-mail with approval. Whatever it is, this is why they are paying you. If they don't approve, then they may not pay.
- **Change control:** Give the client the facts and let them make the decision. The answer may seem obvious, but remember that you don't know everything about the client's organization.
- **Key decisions involving others in the organization, especially upper management:** Not only do you not know everything about the organization, but, if it's a short-term project, they will be there long after you're gone.

In summary, don't take control away from the client. Anytime there is money involved, the client should be the one to make the decision. You help yourself by making them look good. Give them all the info they need to make good decisions, and then let them take credit.

PERSONALITY TYPES

Personality Types have become popular over the last 50 years or so. Sociologist William H. Whyte said in *The Organization Man* that "60 percent of American corporations were using personality tests in 1956, not only to screen potential employees but also to 'check up on people' already employed by the company."[2] Some say that the origin goes back to Hippocrates who theorized that people's body chemistry is what made them so different.

The Myers-Briggs personality types may be the most popular version out there, but there are others: "Leading from your Strengths" Behavioral Assessment, DISC, True Colors, and Larry Crabb's personality types. Since the author is an ENTJ, the idea of categorizing people into certain abstract classifications has always been fascinating. Some personality typing systems not only classify people, but may help you understand how to relate to others of different types.

For example, the Four Personalities were developed by Florence Littauer, who is the best-selling author of *Personality Plus* and other books. Her daughter Marita wrote the book *Wired That Way* that elaborates on the types. This book posits that there are four Types that people generally fall into. This paper will give a brief introduction into those types. Refer to *Wired That* Way for truly understanding and using them.

First, remember that people are a mixture of a lot of different inputs. You can't really classify everyone into one of four types and expect to understand them completely. The Types are generalizations and people live out these generalizations in their own unique way. Do not assume that because someone seems to be a particular type that you know all about them. Their personality is some mixture of all of these, plus other influences, and it is important to respect the individuality and dignity of each person.

Second, the Types are not ways to control another person. They can help you to relate to others who have a different type of personality than you do in positive ways. It is easy for a Powerful Choleric and a Peaceful Phlegmatic to butt heads against each other and get nothing accomplished. But by understanding something about the other person, you can engage with them in positive ways that accomplish much and respect each other's dignity.

Popular Sanguine

The Popular Sanguine is someone who likes to do things the fun way. They are the ones who you see as very outgoing at parties. They can talk about anything at any time and anywhere. They are the ones who can tell a story well. They are great at colorful creativity and at cheering up or motivating others.

However, they can be disorganized and have difficulty remembering details or names. They are not serious about anything, or may seem that way, which may stop others from taking them seriously. They trust others to do the work, even if they should be following up.

The Popular Sanguine can be recognized by the fact that they are always talking and when they do it's in a loud volume. They are the ones you can hear from across the room at those parties, with everyone laughing around them. They often wear bright clothes and accessories because they like to be seen and have fun.

They like people who listen to them and laugh at their jokes. They like to be praised for their accomplishments and even the clothes they wear. The Popular Sanguine dislikes people who criticize them, especially if it's done "coldly" without considering their feelings. Since their humor and appearance is important, they also don't like people who don't appreciate either.

They could often improve if they got more organized. Also, if they had more self-awareness and didn't talk so much when others didn't want it. Finally, their disorganization goes to telling time as well. It would help their colleagues, if they could be more aware of the time and when they should start and stop activities,

Powerful Choleric

The Powerful Choleric likes to do it "my way." They are ready and able to take charge of anything instantly. They can make quick judgments that are often the correct ones. They are the ones who walk into a room and start getting things done.

However, they can be, or come across as, bossy to others. They can even be insensitive to the needs of others because they are focused on the task at hand. That also makes them unwilling to delegate work because they don't think, or aren't sure, that the other person can get it done as well as they can. This reluctance can affect giving credit, too, since they may see themselves as the one who led the task and did the most, or most important work.

The Powerful Choleric can be recognized by their pace. They are the ones who are moving fast and self-confidently through the office. They walk with a purpose and when they don't have a purpose, or can't achieve it, they get restless. When they are working towards their goal, they can overpower others in their quest to achieve it.

They like people who are supportive of their goals and even submissive to them, because this helps them to achieve it. They like those who see things their way and cooperate quickly, rather than put up obstacles or delay in other ways. The Powerful Choleric dislikes people who are, or are perceived to be, lazy and don't want to work constantly. It also annoys them when people become independent and don't follow their lead. They consider that and similar behaviors as disloyal.

The Powerful Choleric could improve in their relationships if they allowed other people to make decisions and delegated authority more. Also, if they worked on being more patient with others and didn't expect others to produce as much as they do, then they wouldn't come across so arrogant and bossy.

Perfect Melancholy

The Perfect Melancholy is all about doing it the right way. They keep everything organized very well. They have high standards and ideals that they strive for and hold others to as well. They can analyze deeply and set long-range goals well.

However, the Perfect Melancholy can spend too much time on preparing as they strive for that perfection. For the same reason, they can get too focused on the details. Then when their life gets out of order or their standards aren't met, then can get depressed. "Failure" will also make them remember negatives and be suspicious of others.

You can tell a Perfect Melancholy by their serious and sensitive nature. They have a well-mannered approach with meticulous and well-groomed looks, but even still they will make self-deprecating comments because they are never good enough.

They like people who are similar to them, that is are serious, intellectual and deep. On the other hand, if someone is not those things, or if they are forgetful, late or disorganized, then they will be frustrated and will try to fix that person.

The Perfect Melancholy is valuable at work because of their sense of detail and love of analysis. They have high follow-through, too, so tend to get things done. However, all of this is complicated because they take life very seriously. If they were less of a perfectionist and allowed others to make mistakes, then they would get along with others much better.

Peaceful Phlegmatic

The Peaceful Phlegmatic is the one who is more balanced and contented with life. Everything is fine with them just as it is. They are the ones who want to do things the easy way. That balanced perspective and even disposition are very helpful when there is a lot of chaos or turmoil in a situation. Whereas the Powerful Choleric will try to fix it, the Peaceful Sanguine will make a joke out of it, and the Perfect Melancholy won't be able to handle it, the Peaceful Phlegmatic will easily be able to calm everything down, maybe just by being there. Their dry sense of humor and pleasing personality help to smooth things over.

However, since the status quo is just fine for them, they may not have the enthusiasm or energy to change things. And when change is required, they will have a hard time deciding between alternatives. Underneath it all, though, they do have a will of iron and once they make up their mind, they will stick to it.

The Peaceful Phlegmatic can be recognized by their calm approach and their relaxed posture. Why stand when you can sit? Why sit when you can lean back comfortably? The guy who glides in his chair to get from one side of the office to the other may be a Peaceful Phlegmatic.

Since they lack decisiveness, they like people who make the decisions for them. Since they are so calm, even wallflower-ish, they can easily get overlooked. They like people who don't ignore them, who recognize their strengths and give them respect that others forget about. They dislike people who are pushy and loud, or expect too much of them. They just don't have the energy.

If the Peaceful Phlegmatic set more goals and became more self-motivated, then they would do better in the world. As with all the other types, if the Peaceful Phlegmatic were more aware of the negative impacts they have on others and tried to adapt, then their relationships would improve. For example, if they were willing to do more and move faster than expected, then others wouldn't get as impatient.

Interactions

talks to a … / When a …	Popular Sanguine	Powerful Choleric	Perfect Melancholy	Peaceful Phlegmatic
Popular Sanguine		Stick to the bottom line; that's what's important	Be sensitive to their schedule and interest in the topic	Be positive and encouraging
Powerful Choleric	Be interested in them; praise them for accomplishments		Pause a lot and allow them to share their thoughts and ideas	Be patient with them and listen well to what they have to say
Perfect Melancholy	Compliment them on their dress, behavior or accomplishments	Stick to the bottom line		Freely offer praise so that they don't depressed from your negativity
Peaceful Phlegmatic	Get excited about the good ideas that they have	Speak faster; practice this and then speak even faster	Come with facts backed up with documentation to support your statements	

A couple of examples of how to implement these ideas might be helpful.

Example #1

Suppose you are a Powerful Choleric and your client is a Peaceful Phlegmatic. You could easily come into the project they are asking you to do and take over. Your decisions and path to success are probably correct from one perspective and the project will be successful. However, if your client is a Peaceful Phlegmatic, then you will probably steamroll them on your way to that success. Their ideas won't be listened to and you may end up making decisions you shouldn't because it's harder for them.

If you recognize them as a Peaceful Phlegmatic, then you can approach them differently than you normally would. You can be calmer and more cordial with them. As you have a conversation, pause (it may seem a long time) so that they can give their input. When they have to make decisions, give them all of the information ahead of time, so that they can think through the options. Then give them clear deadlines of when the decision should be made with the consequences for not making them.

Example #2

Suppose you are a Popular Sanguine and your client is a Powerful Choleric. Your communications may be very frustrating for them. You will naturally feel that the story you are telling is interesting and relevant. They will want to get the job done and see your stories as distracting. They may even start avoiding you because they know that once the conversation starts, it will go on forever.

Instead, recognize their strengths and tendencies. Prepare what you're going to say ahead of time and stay on script, so that you don't "ramble on." Be aware of their body language and when they indicate that it's time for them to move on, tactfully end the conversation. In e-mails, give them a TL;DR or *Too*

Long; Didn't Read at the top, so that they can quickly know the bottom line and won't lose it in the bigger story you have to tell.

Obviously, there are things that the client can do in each of these examples to make the relationship better. If you have an opportunity to diplomatically share that information with them, or if your relationship is strong enough to do so, then it can help a great deal. However, even if that's not possible, there is a lot you can do to not sabotage your relationship, if you just learn to understand and respect them for who they are.

CONCLUSION

We are all engaged in relationships with others. That's part of what makes us human and it's those relationships that help make being human so exciting. The work relationship is important to who we are and where we're going in life. Whether that's the relationship with our boss, colleagues or true clients, we can improve them if we think outside of the specific piece of work we do. By being better at giving them what they need in the way they need it and in the style that they are comfortable with, we exceed their expectations and are more successful in our work.

Project Management sometimes has a bad rap because of the perceived rigidity, and the forms and paperwork. But it's really all about managing the aspects of the project so that it succeeds. Even agile development requires project management to succeed. You as a consultant may not be the project manager, but you will be more successful if you learn from the discipline about how to manage the scope and communications well. Many other aspects of the discipline not discussed here can be helpful, too.

Software engineering is another, very mature discipline that has a lot to teach us. By using the best practices of requirements definition and work estimation, you will have a clearer goal and a clearer path for getting there. Even if your task is an off-the-cuff request, a simple e-mail to describe what they really want and how long it will take to get there, can save you a lot of headaches later.

Professional consulting has developed around people who do work that is more strategic or managerial consulting than the statistician, statistical programmer or data scientist normally does. However, some of the tools that make them successful can still be used by us. This paper discussed Managing the Client and Giving the Client Control. Both are very important to a successful working relationship, especially if they are done with an understanding of the involved Personality Types.

Personality types may be the "loosest" of the four disciplines discussed here but it can cause the most headaches or make things go the smoothest. By being aware of your own personality type and then striving to understand the personalities of others, both in work and in real life, you can be even more successful. It will require you to change the way you do things and adapt them to the needs and desires of others, which can be very hard, but it's worth it.

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