

So you want to be a project management consultant?

[Conference Paper Career Development](#), [Government](#), [Consulting](#) 23 October 2012

Patton, Scott E. | McClung, Nelson | Andrews, Cynthia L.

How to cite this article:

Patton, S. E., McClung, N., & Andrews, C. L. (2012). So you want to be a project management consultant? Paper presented at PMI® Global Congress 2012—North America, Vancouver, British Columbia, Canada. Newtown Square, PA: Project Management Institute.

Nelson McClung, Vice President – Program Operations, ALON Inc.

Cynthia L. Andrews, Vice President – Contracts, ALON Inc.

Abstract

What does it take to be a project management consultant? It is more than a certification and spending some time working on projects. It takes: (1) a solid project management knowledge foundation; (2) experience applying project management “best practices” in practical situations; (3) genuine client relationship management; and (4) establishing credibility. It is not only delivering a project on schedule, within budget, and to performance requirements, but also understanding the client's strategic objectives and delivering value. This paper looks at how to develop these attributes of a project management consultant. Examples are provided from a consulting company where we develop our staff's consulting skills to meet our federal government clients' specific project management needs and where we support staff career development in project management consulting.

Introduction

What does it take to be a project management consultant? As more organizations adopt project management as a competency for achieving strategic business goals, many are seeking the advice of consultants to develop or enhance their project management capabilities. As a member of Project Management Institute's (PMI®) Registered Consultant Program, we have been developing project management consultants to meet our clients' needs. In this paper, we present four attributes of a project management

consultant: (1) a solid foundation in project management or a subject matter expert (SME) in a particular area of project management, such as a PMP® or PMI-RMP®; (2) demonstrated experience applying project management “best practices” in practical situations; (3) genuine customer relationship management (i.e., understanding the client's problems, formulating recommendations, and implementing solutions); and (4) credibility (i.e., why would someone hire you as a consultant?). We discuss what it takes to be a project management consultant: It is not only delivering a project on schedule, within budget, and to performance requirements, but delivering value that helps the client achieve strategic business objectives. Throughout the paper, we will be using examples from the consulting company for which we work, and where we develop our staffs' consulting skills to meet the specific project management needs of our federal government clients, and where we support staff career development in project management consulting.

Project Management Expertise

To be a project management consultant, expertise in project management is required as well as recognition for having that expertise. Expertise in project management can be achieved through education and training, credentials, and specialization in tools and techniques. College degrees and education certifications provide a solid foundation in project management. Institutions offer an array of accredited degrees and non-accredited certifications in project management. Accredited degrees are more common at the Ph.D. or Master's degree level. Bachelor degrees are usually associated with a functional area of study (e.g., construction, information technology).

Since project management is more often an “accidental profession”—that is, project managers are selected based on their technical or managerial expertise and thus lack formal education in the field (Darrell et al, 2010, pgs. 56 – 63)—more common educational opportunities are non-credited, continuing study-type certifications that augment functional or technical expertise with project management education. These programs offer different learning options (e.g., classroom, online), a range of costs, and flexible scheduling. As industries and companies embrace project management practices, there are options for internal classes and training, and these are often aligned with industry-specific project management processes.

The most recognized means of showing expertise is through a credential from a project management professional society. In the U.S., the most popular and probably most recognized credential is the Project Management Professional (PMP)® from the Project Management Institute (PMI). It requires demonstrated knowledge of PMI's Guide to the Project Management Body of Knowledge (PMBOK)® in addition to satisfactorily meeting minimum education and professional experience requirements. In the field of information technology (IT), where there is a high demand for experienced, certified project management professionals, the PMP® is the most sought-after credential because of its rigorous requirements (Crisp 360 Editors, 2012, ¶5). PMI also offers additional credentials based on its foundational standards (e.g., Certified Associate in Project Management (CAPM)®, Program Management Professional (PgMP)®, and OPM3®

Certified Professional) and practice standards and frameworks (e.g., PMI Agile Certified Practitioner (PMI-ACP)®, PMI Risk Management Professional (PMI-RMP)®, and PMI Scheduling Professional (PMI-SP)®).

Specialization in tools and techniques can provide opportunities for gaining a foundation in project management. Based on the industry and project management requirements, there has been a demand at various times for experts in scheduling, earned value management (EVM), risk management, and quality management. For example, a requirement for American National Standards Institute/Electronic Industries Alliance Standard 748 (ANSI/EIA 748) standard compliant EVM systems, used in the controls of major information technology (IT) investments by federal government agencies, created a demand for individuals with EVM system implementation and specific tool experience. The requirement even led to the establishment of EVM professional credentials (e.g., AACE® International Earned Value Professional™ (EVP™)).

Development of interpersonal skills, identified as a tool and technique in several PMBOK® processes, has provided opportunities for education opportunities in executive leadership and coaching. Many organizations are using credentialed executive coaches to develop “soft skills” in project managers and project teams. They can also provide team-building facilitation to improve team performance.

As a project management consulting company, our services are based on providing our clients with resources with the appropriate knowledge and skills. We hire staff with minimum educational and/or certification requirements. We look for candidates with a college degree in the functional area in which they will be working (e.g., information technology, health care, finance). Since we are in the federal government market, the PMP® is a minimum requirement for our project managers. Other certifications and credentials provide our clients with specialized knowledge, such as the Certified Cost Estimator/Analyst (CCEA®) from the Society of Cost Estimating and Analysis or the Certified ScrumMaster (CSM) from the ScrumAlliance®.

Through our Project Management Center of Excellence (COE), we help meet our client's expertise requirements through career development support and specialized training. We encourage our staff to pursue additional education through a tuition reimbursement program. Obtaining additional education and certifications is also tied to their personal career development plans and linked to financial incentives. More importantly, our COE, where we have developed and delivered project management training to help build client-specific competencies, is a resource for our staff. For example, we have provided training on risk management and earned value management to help our teams implement new procedures and practices for our clients. We have also developed system development lifecycle specific training that helped our clients implement agile software development capabilities and associated management processes.

Demonstrated Experience

Getting a PMP® or a certificate in project management is just the start. Consultants need to demonstrate that they can apply that knowledge in client engagements. It means taking standard processes and “best practices” and applying them in real-world situations to deliver successful projects. The most recognized way of demonstrating experience is having successfully functioned as a project manager. This usually results in practical, hands-on experience working on projects, learning to lead and manage a diverse team, and successfully applying project management knowledge to meet project objectives.

There are other ways to gain experience, however, depending on the organization and the type of projects. This could be as a member of a project team where the knowledge is applied to supporting different functions of the project in specific roles (e.g., risk manager, communications specialist, scheduler, etc.). Often these roles are dependent on the knowledge of the organization's project management methodologies and practices. Participating as part of a project management office (PMO) offers roles usually aligned along PMBOK® knowledge areas (e.g., risk management, quality management, communication management, etc.) or process groups (e.g., planning, controls). PMOs usually provide exposure to different projects and opportunities to apply project management knowledge. Where the influence of PMOs in organizations has expanded outside of merely managing projects (e.g., through focus on performance measurement, strategic alignment, resource management), there are more opportunities to apply project management knowledge in a wider range of situations—for example: training and professional development; increased specialization; and application of knowledge to program and portfolio management processes.

Another way to gain experience and learn to apply project management knowledge is from working with people who have already succeeded in this endeavor. Whether on a project team or as a member of a PMO, observing successful project management professionals in action or taking advantage of a mentoring or coaching arrangement will help in gaining experience. Professional societies (e.g., PMI Communities of Practice) and social networks (e.g., LinkedIn®) offer individuals with opportunities to share knowledge on the application of project management processes and practices.

The key is being able to demonstrate “added value” by applying the project management knowledge in practical situations. The consultant will need to be able to identify a problem with the performance of a project, develop and implement improvement measures, and realize project performance improvements.

As a project management consulting company, continuous improvement is a foundation of our consulting services. Through our Project Management COE, we facilitate knowledge sharing sessions that help staff identify practices and techniques that could be applicable to their client engagement. Our staff participates in professional societies where they share current trends in applying best practices. For example, every year we send staff to the PMI Global Congress and various Gartner Inc. symposiums, and they are required to develop white papers summarizing key findings. We assist certified staff in maintaining their credentials by identifying targeted learning opportunities that are relative to our client engagements.

Client Relationship Management

The biggest challenge for many project management consultants is not applying project management knowledge and demonstrated experience in client engagements, but having to manage a client's expectations. This involves another set of skills that are often difficult to master:

- **Strong communication skills.** Consultants need to establish open and frequent interactions with the client and have the ability to speak and articulate thoughts clearly and concisely. This includes being able to present well, to write clearly and effectively, and to listen actively.
- **Proven problem-solving skills.** When a problem is identified, consultants need to be able to define the problem, identify and assess root causes, and develop recommendations that will address the problem and satisfy the client.

Managing client relationships also involves a different set of expectations and challenges. To be successful, the consultant will have to understand the client(s) and their roles in their organizations. England (2012) identified several challenges when working within a client's organization:

- **Adjusting to the methodology.** The client's organization may have established project management processes and practices and the consultant will have to “align” with the skills and knowledge the client is providing. The client's methodology needs to be followed and any “best practices” implemented needs to be in terms of the client's processes and practices.
- **Understanding the organizational structure.** The client has constraints and opportunities offered by the client's own organization. Obtaining an understanding of the organization and the client's business processes, organizational resources, and reporting requirements is an important part of the consultant being able to help their clients.
- **Understanding the organizational politics.** It is important to know the world in which the client must operate so that the consultant understands how to successfully help their client.
- **Being the outsider.** This could be a good thing, but it could be problematic. The consultant is often in the role of a “sword or shield” for the client—delivering unfavorable messages or defending the client's position. If the consultant focuses on doing what's best for the client, their work will provide better results for their organization.

As a project management consulting company, our success and continued business is based on sound client relationships. All new employees are required to participate in an introduction to consulting training. This helps set expectations and provides new employees with resources for developing client relationship management skills. We use mentoring and coaching to help refine communication and problem-solving skills of all staff, but with particular attention to staff responsible for client interactions. We also use personal performance assessments, with input from clients, peers, subordinates, and

managers, to identify strengths and weaknesses in client relationship management. Weaknesses are addressed through professional development plans.

We also understand that client relationships are about personalities. We involve senior management in helping establish and maintain client relationships. This helps with the early identification and resolution of personality conflicts between consultants and clients.

Establishing Credibility

So why would someone hire you as a project management consultant? It is about establishing credibility. Credibility comes through relationships with clients who have become confident in the consultant's abilities to meet their expectations. Clients appreciate qualities that all of us should be capable of providing: honesty, dependability, integrity, and hard work. By establishing trust based on sound relationships, proven project management capabilities, and the ability to meet their expectations, clients will share the consultant's accomplishments with others, which establishes credibility.

Credibility also comes from delivering value. Value could be measured by successfully delivering that project on schedule, within budget, and to performance requirements. However, when a consultant can help a client address their “pain points” while delivering that project, the consultant is now focusing on the client's true needs. Consultants must develop the ability to identify and understand their clients' problems, empathize with their pain, and find solutions. When a client asks, “What do you think we should do?” the consultant has established credibility in being able to help with what's best for the client.

Establishing credibility can be greatly helped by publicizing the consultants' accomplishments and their value-added consulting successes. However, talking about oneself and promoting one's successes is often very difficult for many people. Through our Project Management COE, we help consultants develop short case studies about what they accomplished stating the client's problem, the problem-solving approach, and the value the client realized from implementing the solution. We facilitate knowledgesharing sessions with our clients and consultants to share lessons learned and best practices from specific consulting practices. We support our consultants with opportunities to speak about their engagements at, for example, our company-sponsored Project Management Day forum, and at professional society events (e.g., PMI chapter- sponsored events).

The Successful Consultant

So you want to be a project management consultant? We have presented four attributes of a project management consultant: (1) a solid foundation in project management, (2) demonstrated experience, (3) customer relationship management, and (4) credibility. We also discussed what it takes to be a project management consultant—that it is not only delivering a project on schedule, within budget, and to performance requirements, but more so delivering value that helps the client achieve strategic business objectives.

As a project management consulting company, we know what it takes to be a successful consultant. In addition to what we have presented in this paper, here are several attributes we have observed in our more successful project management consultants:

- Confident—the consultant being able to successfully use the four attributes to deliver value to the client, continually, and be willing to assess and improve his or her skills and performance.
- Proactive—continually assessing the client's business objectives for potential impacts. By establishing sound client relations, the consultant can identify potential client “pain points” and prepare for possible solutions.
- Innovative—taking proven practices and, with slight modifications, address their client's “pain points.” Providing value by using common tools and techniques, effectively and efficiently, to meet unique client needs.

References

Crisp 360 Editors. (2012, March 6). *The top 10 IT certifications for 2012*. Retrieved from <http://www.crisp360.com/news/top-10-it-certifications-2012/>

Darrell, V., Baccarini, D. & Love, P. (2010, December). Demystifying the folklore of the accidental project manager in the public sector. *Project Management Journal*, 41(5), 56-63.

England, B. (2012). *Being hired as the PM consultant*. Retrieved from <http://pmtips.net/>

This material has been reproduced with the permission of the copyright owner. Unauthorized reproduction of this material is strictly prohibited. For permission to reproduce this material, please contact PMI or any listed author.

© 2012, Scott E. Patton, Nelson McClung, and Cynthia L. Andrews
Originally published as a part of 2012 PMI Global Congress Proceedings – Vancouver, BC