



The Role of the Consultant and Client in Energy Behaviour Programmes

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Introduction

This article explores the role of the consultant and the client in a behaviour change programme. This should be read with the article *Writing Energy Reduction Behaviour Change Proposals*.

As you read this you may be a seasoned energy professional whose usual projects are focused on technical and/or data solutions. The interface with the client is often with technical counterparts in the client organisation. In the main you are dealing with “things” not people but you know there is a people dimension in the success of any type of consultancy assignment.

However, when we come to behaviour change projects we are dealing at a different level. Your interpersonal, presentation and communication skills need to be at a good level. For example, if you are not personally motivated you will find it hard to inspire your clients. Enthusiasm of the ‘possible’ is infectious. No one is going to correct you on the technical side as you are an expert. But you will feel vulnerable in your first behaviour projects as you are breaking new ground and going up a learning curve. But it is a curve you must go up and having a learning attitude makes the journey easier. Never stop asking yourself good questions.

Some of you reading this have done behaviour change programmes and will identify with this. For those new to behaviour projects do not be afraid of making mistakes.

When I started in 1988 I was a seasoned Chartered Engineer with a lot of industrial experience. I had also been involved in management training and mentoring so that helped. But essentially I was looking at a blank sheet of paper. I had been given the task of setting up the first Behaviour Change Unit within a British energy consultancy. I had no idea what I was doing. So I formed a team and began with technical training and with a solid base built up into behaviour change. There were no gurus or experts in this in the 1980s – just a few isolated people with a few ideas.

The company director who recruited me said “John, you have 12 months to get something established and make a profit. If you fail I will fire you”. With that encouraging thought I got moving. I had some lucky early breaks by landing some contracts in ‘Management of Change’ training for organisations undergoing privatisation. This gave me breathing space into 1990 to move into central and Eastern Europe emerging from decades of Communism. So it was not until 1992 I finally began what I was originally hired to do.

One example of failure was getting in front of the Board of an NHS Trust where I was designing an energy awareness campaign. I knew top level commitment was vital for success. During the meeting the CEO said: “John, you have our support. Now please explain what precisely do you want us to do?” At that point I was speechless. The reason was I had no idea! I learned from that episode and it

never happened again. Never ask for support unless you know what it looks like! Also if you are asking for support from top management two key ingredients are “visibility” and “taking little time”. Top management are busy and their support for the initiative needs to be visible to all employees.

Is a consultant needed?

This is a question all end users should ask. In some circumstances the answer is ‘no’. Take for example the Case Study on the EnCO website of the manufacturer in Cambridgeshire who saved 25.4% of electricity by a simple switch off campaign. I identified the opportunity during an ESOS Energy Audit but it was the site who implemented the initiative with no outside help.

Another example with minimal support is Sam Arje when he was the Energy Manager at Bourne Leisure Ltd. The company had 54 sites and Sam ran a 2 day course for staff – one from each site who acted as Site Energy Champion. The training was facilitated by an external trainer. Sam and his team then personally visited each site to provide tailored advice. In 12 months 7% of electricity had been saved worth £2 million. These two examples have two things in common: they started from a low awareness/high potential position and their implementation strategies were straightforward.

However, in larger and more complex operations where energy management practices are average or above, it is less straightforward and often requires external expertise. This is when a consultant may be needed.

Another factor is that the consultant can be an agent of change simply because they are outsiders. A number of times Energy Managers within organisations have said to me: “Why is it, John, that the Board listens to you but not to me? I have been telling them the things you said for ages!” The answer is often because “a prophet is not without honour except in his own country”. Senior management will often listen to an outsider simply because they are outsiders.

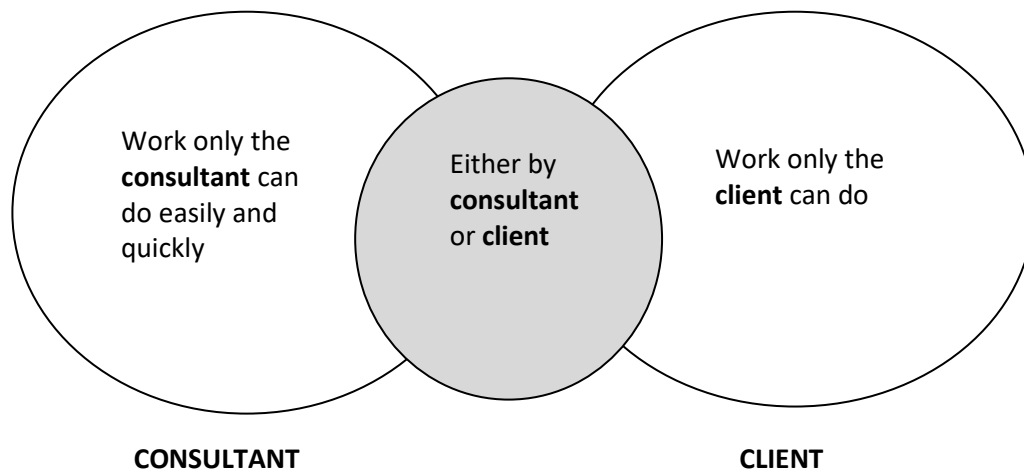
Another thing to consider is that consultants are easily expendable unlike internal staff. Therefore a consultant can afford to take more risks in speaking truth to power. Because of hierarchies, and power structures within organisations, sometimes energy staff are afraid of ‘telling it like it is’ in case they get sidelined or lose their jobs.

I remember doing a detailed gap analysis for a large multi-national with its HQ in London. I presented my findings to the Board. My brief was to come up with a people strategy but also to make some general comments on energy management practices. I explained some fairly basic principles they were not practicing. One of the Board members had been the company’s Energy Manager 25 years earlier. He said: “There is absolutely nothing new in what you describe. We were doing all those things 25 years ago when I was Energy Manager”. At that point I could have backed down but I decided to speak truth to power and said: “You may have been doing these things 25 years ago but, with respect, you are not doing these things today. That is why they are in my report”. I was asked to leave the meeting and was fired. I took a risk they would listen but I failed. However, the upside was that the company implemented the people strategy I developed and saved millions. I learned this by reading a case study in an energy journal three years later. So perhaps they later realised I was correct but were too embarrassed to ask me back!

Consultant/Client Partnership

From the outset it must be made clear that you, the consultant, are entering into a **partnership** with the client to achieve a successful outcome. It is a relationship of mutual interdependence. The consultant team does what only they can do. The client does only what the client can do. But the

important point is that the client needs the consultant to succeed and the consultant needs the client to succeed. Of course there is some grey ground in the middle where the work could be done by either the client or the consultant. This grey area needs to be identified. If the client has the time and the skills to do the work then it should fall in their scope. It reduces the cost and increases the client ownership which is vital for success. However, in some situations the client is short of time and/or skills and this is where the consultant covers the work but at extra cost to the client.



It is important that the client fully understands their role in the partnership because if they fail, the project will fail, no matter how skilled or experienced the consultant or how well the consultant team does their role.

Reasons for Failure

I have been involved in programmes which failed because the client failed to fulfil its role. This is despite knowing at the outset their responsibilities. In this situation it is usual to blame the consultant rather than face up to their own failure. This may seem a stark assertion but having been involved in initiatives for 33 years I have seen most things. I have been fired from projects because of client failure or a lack of willingness to commit. I have gradually learned to identify risky clients early in the process and have walked away from potential projects as I sense the time and management culture is not committed to change. As a Yorkshireman I tend to be blunt and tell the client the problem and for them to ring me back when the time is right.

The most open clients are those who have tried something on their own or with another consultant and failed. If they own the failure and use it as an opportunity to learn. What went wrong? What did we fail in? How can we do things better? These are clients who know there is a way through the mess but they need someone with perspective and skill to help.

Another source of client failure is inexperience in handling a consultant. Some clients fail to differentiate between a consultant and a contractor. An enlightened client generally tells the contractor what needs doing but asks a consultant: "What needs doing?" To be fair some work in a programme could be more of contractor in the delivery phase, such as training, but the consultant is the 'ideas' person as well as the doer.

Some end users might be reading this and thinking "But what about incompetent consultants who come up with inappropriate strategies and plans which are unworkable?" I agree with this. Some

programmes fail because of the incompetence of the consultant. I know this partly from my early failures but in the last two decades of being called in as a trouble-shooter I have been asked to discover why a programme has failed or is in terminal decline. It is sad to see how some consultants have performed – often offering “off the shelf” solutions which are totally inappropriate to a client. These consultants were not aware that every organisation has its own unique culture, needs and opportunities.

Role of Client

Sometimes when a client is inexperienced in working in partnership with a consultant I might say: “You do realise that I can save you no energy at all”. If a statement like this fails to attract a client’s interest a red light should start flashing. In response to this question most clients should respond by a question like: “What do you mean?” or “Explain yourself”. This is the time to explain the role of the client and the consultant. As consultant you are the enabler, the agent of change who can build a strategy and structure but the change itself (i.e. behaviour change which saves energy) is 100% the client. The consultant saves nothing. The client saves everything. This might seem obvious when stated like this but for an inexperienced client it sometimes needs spelling out. Some of this can be put into the proposal so everyone, literally, is on the same page. The ideal client is one who has been a consultant in the past. They see it from both sides. However, the more usual direction of travel is for client staff to leave and join a consultancy or set up on their own as consultants. I myself am in this category. I worked as a chemical engineer designing and running large chemical plants and reducing energy use for 14 years before becoming a consultant in 1988.

The Ideal Relationship

The ideal consultant/client is one in which there is a clear definition of the partner relationship and there is mutual trust and respect between parties. The consultant needs to remember their role as the servant of the client to whom they are accountable. A good personal relationship is important and it helps if you actually like each other but it is not essential. The relationship needs to be strong enough to build a bridge which can bear the weight of truth when it needs to be said. In the past I have had some difficult clients but with them I make an extra effort. Because as consultant you can move effortlessly between management levels it is possible to praise the efforts of the energy team, when appropriate, to senior management and act as their advocate. This helps to build trust.

It is also important that when success arrives the credit goes to the client and not to the consultant. No one needs to know the process which delivers the success which is essentially an effective partnership. Those who are influential in the organisation are likely to understand the role of the consultant in a successful outcome. Even if they don’t, does it really matter? As consultants we can enjoy the reflected glory when the client rises to accept an award on a platform from a minor celebrity. We have the satisfaction of knowing we were the catalyst for change and should rejoice with those who rejoice. As consultants we are not here to collect awards but to deliver change as time is short and the need urgent. Clients always remember where they got good advice.

