

Seeing clients in 4D

When someone wants our help, it's tempting to come up with a ready-made solution from our toolkit of expertise. But do we understand the whole story?

The technical dimension of their problem might be clear enough – but what about the personal dimension (what's at stake for them individually), the political dimension (the impact of power dynamics), and the cultural dimension (the specifics of their context)?

Understanding someone's situation in 4D means that any help you offer will address the right problem – and the other person can be confident that you get the complexities of their predicament before they let you loose on their organisation.

Technical

What are the technical and professional issues that the client wants help with? What's the value they want to create?

Personal

What's at stake for this individual? What matters to them? What's their personal style? Their exposure to the problem? Its impact on their reputation and aspirations?

Political

What are the power dynamics? Among the management team? Between divisions or territories? Who are the significant stakeholders beyond your direct contacts?

Cultural

What difference does the organisation's "way we do things around here" make to the impact of the problem, and the character of a good solution?

What do the 4Ds look like in practice?

The personal dimension

One consultant was perplexed that a client was feeding them all the issues that needed to be in the report to the board. Why go to the trouble and expenses of bringing in a consultancy for that? It turned out the client was having difficulty getting the attention of senior people in the business – what they wanted was someone else's voice to add weight to their own.

The political dimension

For one charitable organisation there was an apparently straightforward strategy question – should they expand incrementally, or go for accelerated growth? There were business arguments pointing either way – but the debate was complicated by the tussle for power between the person running the organisation day-to-day, and the chair and founder, who each championed a different position. That political clash made it difficult to address and resolve the strategy question in a considered, evidenced-based way.

The cultural dimension

“They were arrogant” was the verdict of one client on their experience of working with a large consultancy firm – they didn’t seem to recognise that solutions that worked elsewhere might not fit the context of this new client. The firm’s expertise and experience were not in question – but their capacity to understand and adapt to a different culture was. Successfully consulting with a family-owned firm, or a founder-led firm, or a charity, or a partnership, requires an understanding how things get done and decided in that kind of culture.

Understanding a client in 4D

What’s needed is an open mind, and a lot of curiosity – as Steven Covey puts it: “seek first to understand before being understood.” And a relationship of trust, where clients feel able to open up about more than the technical specifics of what’s troubling them. In their work on “the trusted advisor”, David Maister and his colleagues describe what contributes to a relationship of trust – **credibility** (about what you say), **reliability** (about what you do), **self- or other-orientation** (about your motivation), and **business intimacy** (about the quality of your relationship). It’s intimacy, a combination of openness and empathy, that creates the conditions for the kind of conversation that allows us to understand a client’s situation in the round.