



Effective remote consulting:

Delivering high quality consulting with lower carbon emissions

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Context: reducing carbon emissions

The UK Government has committed to reduce carbon emissions by 34% on 1990 levels by 2020 and 80% by 2050 as part of the transition to a low-carbon economy. Although the Copenhagen climate summit in December 2009 failed to secure legally binding targets, the UK's target is among pledges from over 90 countries submitted to date under the [Copenhagen Accord](#). Taken together, pledges by these 90 countries account for 80% of global emissions from energy use.

What this means for business

For organisations like [IOD PARC](#) these targets present an opportunity to demonstrate, and defend if necessary, commitment to and investment in improving environmental performance. Even for businesses without an environmental policy, it's a chance to display innovation in order to get ahead of the game in terms of legislation, save money, facilitate work-life balance for their staff and capitalise on market trends to add value to their organisation.

In an arena such as international development, which is central to IOD PARC's consulting portfolio, as in many other sectors, there's also a clear moral imperative for reducing the climate impact of operating. The Fourth Assessment Report by the Intergovernmental Panel on Climate Change (IPCC), [Climate Change 2007](#), found that the regions likely to be especially affected by climate change included Africa, 'because of low adaptive capacity and projected climate change impacts' and the Asian and African megadeltas, 'due to large populations and high exposure to sea level rise, storm surges and river flooding'. The very regions the international development sector aims to support will be the first to suffer the damaging effects of climate change.

Can travel be reduced, in line with environmental policy and targets, whilst continuing to deliver the highest quality of consulting services to clients and partners, draw on expertise world-wide and maintain strong, constructive relationships?

Jet-setting: the case for change

To date travel has been central to the way in which consulting is undertaken in the international development sector and in others. It has been an important means of establishing relationships with clients, to understand the context in which they work, and to involve them and other experts closely in the work that development professionals undertake. Any global organisation with an internationally dispersed team or client base will have similar characteristics and face similar challenges. Travel certainly enables essential business processes but with the bigger picture in mind, it's a good time to question whether travel in itself is an essential means to this end, and to consider the alternatives.

What are the alternatives to travel?

What are remote consulting technologies and approaches, and how and when should they be used?

The popularity, quality and affordability of communications technology is increasing rapidly. As a result, opportunities for remote working have grown enormously in recent years. Email alone quickly transformed the global communication landscape and it's worth considering what the next revolution might be. Organisations can draw on a range of technologies to communicate remotely with or solicit information from staff, clients and partners. These include landline and mobile phones, email, webcams, online surveys and video conferencing (VC), and free VOIP (voice over internet protocol, or web-based) solutions such as Skype as well as the mobile freedom granted by smartphone devices like the BlackBerry and iPhone. IOD PARC's experience has demonstrated that these technologies can be used for the majority of interventions in the consulting process, including planning, technical work, analysis and progress meetings.

Skype

Overview

Skype is easy-to-use software that allows individuals and businesses online anywhere in the world to make free video and voice calls, send instant messages and share files with other Skype users. Credit can be purchased to make low-cost calls to landlines and mobiles.

At work: IOD PARC case study

Colleagues and clients can conduct free Skype conference or video calls at their desk or via compatible mobile devices. At IOD PARC, a Skype account is created for each new employee and the tool is integral to internal staff communication and meetings, both in-country and with staff abroad. Instant messaging is convenient and reduces email traffic for quick, informal exchanges between two or more people, and supports team cohesion. Remote staff join monthly company meetings via Skype audio conference. Free international calls cut phone bills and while the connection quality and delay may not always be as good as over the phone, for organisations like IOD PARC without multi-way phone conference capability Skype offers a unique and cost-free solution, and call quality is improving all the time. Staff who spend a lot of time out of the office can keep in touch with those at home over Skype at a reduced cost to themselves and their employer.

How to get it

Download Skype for free at <http://www.skype.com/> but be aware that some organisations restrict staff permissions to install software. Connections to countries with unreliable web infrastructure require sufficient bandwidth for a quality connection, especially for video calls.

IOD PARC staff have found that use of VC and Skype generally increases performance in their work, client relationships, project cost and work-life balance. Their use very rarely results in a decline in quality or an increase in cost. In general we've found that VC works well although difficulties in connecting can be experienced due to variance in, for example, the compatibility of systems or the quality of phone lines, and whether those involved are familiar with the technology. The more engagement we have with particular clients, the better the technology seems to work.

However, technology is only one aspect. Just as important is the attitude of users and the effort required to learn how to work with these new technologies in a non-technical sense, for example how to conduct oneself in virtual meetings or how to chair them.

To travel or not to travel: key decision factors

What are the key factors that can be used in helping to make decisions around delivering high quality consulting whilst reducing travel (and carbon emissions) in the future?

For clients

- **Budget:** A tight budget can be economised by replacing travel with virtual meetings.
- **Technology:** Is it available and familiar to all those involved?
- **Length of assignment:** Continuous support and interaction is enabled at low cost via remote communications.
- **Local infrastructure for technology:** Can the internet connection of all involved support quality remote interaction? A poor line detracts from the content of a discussion. Test it well before an initial meeting. It's worth persisting with initial hitches as links should be smoother once up and running.
- **Personal circumstances:** If travel isn't possible for personal or circumstantial reasons, technology can allow a team to maintain contact and keep progress on track.
- **Principle/compliance:** Is there a contractual, policy-based or moral obligation to strive to move in the direction of remote working?
- **Skills:** Are meeting participants able to use the technology? Is the meeting host trained in effective remote meeting facilitation?
- **Cost:** Video conferencing technology is expensive but there are increasing options for high quality, free web-based video software on the market.
- **Facilities:** Do all meeting participants have access to a suitable meeting space, e.g. for sensitive or confidential discussions? Simple restrictions such as limited meeting room availability at the laboriously scheduled time can rule out a VC. Room acoustics can affect the quality of VC links.
- **Number of connections:** For VC and Skype, bilateral links are easier to manage. Multiple connections with participants in different locations at once place a burden on bandwidth and restrict interactions to 'lowest common denominator' technology.

For consultants

- **Relationship:** Is there an established relationship between the consultant and client? IOD PARC's experience clearly demonstrates that virtual meetings work better when those involved have previously met in person and have already established a basic relationship or rapport with each other.
- **Type of assignment:** Data-gathering interviews where little rapport needs to be established can be effectively conducted remotely where interviewees have access to technology. Virtual contact is also appropriate for regular operational meetings with dispersed teams. Delivering difficult messages may be more sensitively managed in person.
- **Attitudes:** Are there any barriers or preferences, imagined or based on previous experience, which need to be addressed or challenged? Changing habits takes time, effort and incentive.
- **Time zone:** Is the time difference manageable remotely – although perhaps the odd 5am start in the UK to enable a virtual meeting with Asia is preferable to a 12-hour flight and jet-lag.
- **Culture:** In some parts of the world, significant importance is placed on meeting in person to establish trust and respect. Is this a habit which can be reasonably influenced or would this be an insensitive imposition on the local culture?
- **Pragmatism:** In any circumstances, remote interaction can never fully substitute for meeting in person, in situ – but be selective about when travel will add to the value and quality of the work enough to justify it.
- **Compromise:** What might be a lifeline for one isolated person could be lonely for another who's forced to work from home if they don't get a say in it.
- **User friendliness and saturation:** The best tools are easy to use and used by many others.

And in everyone's interest

- **Mitigating travel risks:** An erupting volcano, an airline strike or extreme weather can ground flights, delay work and cost money – remote meetings are a reliable alternative.

Changing behaviour: power to the client

Embracing a new way of interacting requires a shift on both sides, consultant and client, but presents an opportunity for the client in particular to affect a change, for example by making travel reduction a contractual condition. In the international development sector, there is growing political and financial resistance to the exclusive use of international consultants. Using national consultants who are mentored by international ones, if possible using remote communications technology, presents a two-fold opportunity to contribute to local capacity building and reduce long-haul travel. Companies like IOD PARC stand to benefit from building partnerships with organisations in the countries in which we work that will enable us to deliver in this more collaborative way.

Most of us enjoy travelling. We like to meet each other face-to-face and see the world for ourselves. Most of us know someone who likes to show off about how many places they can tick off on the map. At work, travelling to meet people may speed up the process of building trust and confidence but at the cost of slowing down the attainment of other objectives. For those in the habit of working like this, the perceived difficulty and extra time required in working remotely can feel less efficient than being face-to-face. The information exchange may be more efficient in person, but at what cost? Taking the bigger view, the efficiencies gained in meeting remotely tip the balance on the advantages of a face-to-face meeting.

Effective consulting via video conference: IOD PARC case study **Performance Measurement in the Australia-Indonesia Partnership 2009-10**

IOD PARC supported [AusAID](#) staff as they developed a country-level performance assessment framework, including sector performance assessment frameworks. In October 2009 a consensus had been reached on sector outcomes but the 12 sector teams were at different stages in finalising their performance assessment frameworks. This made a single, brief consultant visit unsuitable so instead we suggested VC support to allow a longer period over which to support sectors in getting to the same place, at a pace that was appropriate to them. Our client was happy with this solution (even though there was money in the budget for an air ticket). VC interventions by our UK-based consultant broke the ice with sector teams for our regional consultant to then go in and work on the detail. VC contact was critical to sustaining momentum in this long-term project with the result that it set later work up for success. In our estimation the process would have suffered without it. It also allowed our client to draw on quality, consistent support from our UK consultant at a time when he was unable to travel to be with them in person. Once the client's Performance and Quality Unit was established we were able to bring this level of support to a close.

The technology didn't always work as well as hoped with delays to the connection, in which case the team reverted to a phone call. However, in our assessment a phone call doesn't always do: with challenging teams in particular VC was a much better intervention, effectively making our meeting room an extension of the client's and allowing our consultant to chair and facilitate the meetings remotely. It enabled three-ways links between our consultant and AusAID's Jakarta and Canberra offices. With meetings lasting up to three hours VC was a much more engaging format. We found that seeing people over VC fosters a collective intent and spirit of commitment more than a phone call can.

For this assignment VC offered the best of both worlds, enabling virtual face-to-face support at a time and pace to suit the client, and ultimately strengthening the success of the project.

Many professions look for field experience from prospective staff who in turn look for opportunities to travel with their job in order to get this on their CV. Clients can influence a shift of focus in recruitment towards a broader interpretation of 'experience' which may include, for example, evidence of effective *remote* team leadership.

Looking to the future

The future of consulting is one of making the case for travel in each instance and not defaulting to it. Such a significant change will require a new partnership approach to working in which everybody has a role to play. It presents a challenge but equally an opportunity to set a positive example and inspire others. Reducing travel need not compromise the quality of consulting services to clients. The case for mainstreaming communications technology into consulting offers multiple benefits in terms of reducing costs, saving time, benefiting work-life balance and enhancing environmental performance.