



## Making it Work—Consulting in the Time of a Global Pandemic

Working remotely since mid-March of 2020, Tunnell consultants have adapted to their new circumstances, learning as they go how to adjust the consulting model to a predominantly virtual work mode. Consultants Charlotte Eberle and Cliff Sachs recently took some time with the *Newsletter* to discuss their experiences with two different client engagements.

### Were you working with new clients or existing clients?

**Eberle**—Both. We were already working with an existing client on a long-term project and started supporting a new client in October 2020. The long-term project, involving a contract manufacturing facility, started in person in September 2019 and went through September of 2020. The new project began the last week in October and called for a rapid implementation with a relatively quick turnaround time of about twelve weeks.

**Sachs**—The shorter-term engagement was for a new company that asked us to develop a Quality Management System and provide the appropriate documentation to start up their new manufacturing facility.



**Eberle**—Establishing effective client communications and building trust. Our introductions to the management team were via Zoom, which meant that from the beginning, and in most cases, we were working with people we really had not “seen”. As a result, we had to over-communicate, via e-mail updates and Zoom meetings, in an effort to simulate the kind of discussions we might have if we were in the same room, hallway, or cafeteria. Early on, Tunnell established and agreed with the client on communication expectations. For example, it should not take more than one business day to respond to an e-mail. And, we would indicate when something was “urgent” in order to receive a quick response to a question.

### What were the biggest challenges you faced with your new client?

## Did the Tunnell team face any internal challenges?

**Sachs**—Our consulting team was dispersed geographically and working virtually, so we met and communicated primarily via Zoom.

**Eberle**—Yes, although we worked as a team, our deliverables (documents) were drafted and produced separately, by seven geographically dispersed people. Because of this, Cliff, as QA Lead, was responsible for the final review of all documents (totaling ~200) to ensure that they read cohesively, as if a single author had drafted all of them. Had we all been on-site, we would have held at least one daily huddle to catch up on what we were working on and where we were. To try to achieve that kind of cohesion, as project manager, I was copied on every team e-mail. As important as external communication is, internal communication is just as important. Finally, we found that documentation of all meetings, decisions, and progress, while time-consuming, is key in a virtual assignment.



**Eberle**—The client’s project manager and I had a good rapport, though building rapport was slightly more challenging with other team members on the client side as virtual engagements do not necessarily allow for the spontaneous interactions and casual conversation that gradually build a relationship. And regarding trust—I would hope so; however, it is truly hard to tell, especially because of the short-term nature of the engagement. On the other hand, since we did not spend time traveling, our team had more time to dedicate to the client on a weekly basis.

**Sachs**—Because we were working on Zoom we had to take the extra time to try and get to know our clients. We didn’t have the luxury of talking to them in the coffee room and that kind of rapport is important to a client relationship.

## How did you build the relationship with the client and earn their trust?

## Do you think the outcome was any different in this virtual situation?

**Eberle**—In terms of project deliverables, the outcome was not different. However, the process to produce quality project deliverables differed. The virtual aspect of the project resulted in our team spending more time finding answers than we estimated. Had we been on-site, we could have taken a tour of the facility to get acquainted with current processes and equipment, we could have asked questions immediately as they came up, or more easily mapped out a suitable element of the project.

**Eberle**—When we started our engagement with the new client remotely, our team had to work to build a trusting relationship from the start. By contrast, our more established engagement had started as a team on site in September of 2019 and by the time COVID altered the way we do business, we already had established a working relationship and trust.

**Sachs**—Yes, and because of that, we had become “embedded” with them, functioning as partners and going back and forth to the site regularly.

## How did that new client experience differ from working with an established client?

## What changed after the COVID protocols were put in place?

**Eberle**—Some communication efficiencies initially slipped in the new remote mode. We learned that it is key to have access to our client’s internal systems (e.g., MS Teams, Zoom, and chat functionality) in order to help simulate the “small talk”, “quick questions”, or desk conversations that would occur if we were on site.

**Sachs**—At our established project we already had access to their internal Skype network, email, calendar and other internal systems, helping us continue the kind of spontaneous exchange we had had on site.

**Sachs**—Since we were working remotely, we were able to be more focused on a particular task.

**Eberle**—Human interaction is essential to develop strong internal team and client relationships. We learned that creating a “high-touch” environment (e.g., frequent video conferencing or instant messaging) is conducive for effective communication and collaboration. Robust communications with our team and client, empowering team members by celebrating small and large wins, and diligent documentation go a long way to facilitating a successful virtual project.

**Any key takeaways from almost a year in virtual consulting mode?**

### **About our consultants**

**Charlotte Eberle** joined Tunnell Consulting in January of 2018 and has more than 5 years’ experience in the consulting field and, most recently, focusing on the biologics and gene therapy space. She graduated from Villanova University with a BS in Chemical Engineering.

**Cliff Sachs** has more than 35 years’ experience in the fields of Quality Assurance/Quality Systems, CMC Regulatory Documentation and Analytical Research and Development. Prior to joining Tunnell in 2016, he worked in senior management positions in these areas at Bristol-Myers Squibb and had prior consulting experience. A graduate of the State University of New York at Binghamton with a BS in Chemistry, Mr. Sachs also holds an MBA in Pharmaceutical Studies from Fairleigh Dickinson University.