

# *Developing and Managing Internal Consultants*

AIMC 2003 - Annual Conference

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## Purpose

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*Explore the challenges and success factors in managing an internal consulting function with opportunities to learn new ideas and approaches from interview data, workshop participants and the presenter.*

# Outcomes

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- Identify the success factors and strategies to meet challenges in managing an internal function
- Learn new ideas, approaches and concepts in such areas as Setting the Stage at Hiring, Navigating the Hierarchy, Client/Consultant Agreement and other participant identified topics
- Identify key internal consultant competencies and gain fresh perspectives to address development issues

# *Key Success Factors*

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- Consultant Autonomy
- Supporting the Business
- Setting the Stage at Hiring
- Marketing Services
- Consulting Process
- Team Collaboration and Partnership
- Client / Consultant Agreements
- Choosing the Role

# What is A Consultant?

*A consultant uses...*

- Expertise
- Influence
- Personal Skills

*To facilitate...*

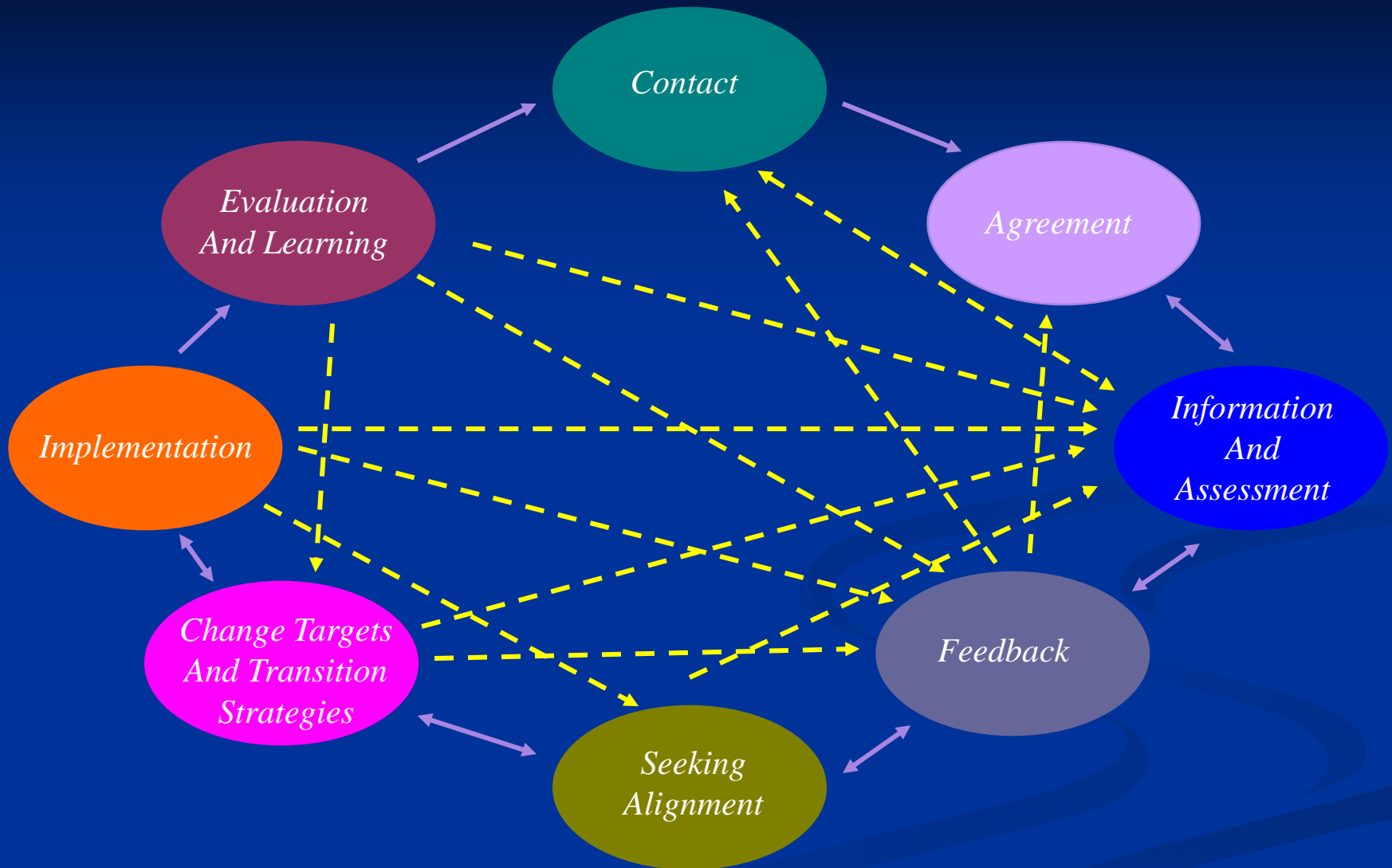
A  
Client  
Requested  
Change

*Without formal authority to implement recommended actions*

Excerpt from "Consulting on the Inside", by Bev Scott, ASTD Publishing, 2000.

"Developing and Managing Internal Consultants", Bev Scott, AIMC 2003 Annual Conference

# The Process of Consulting

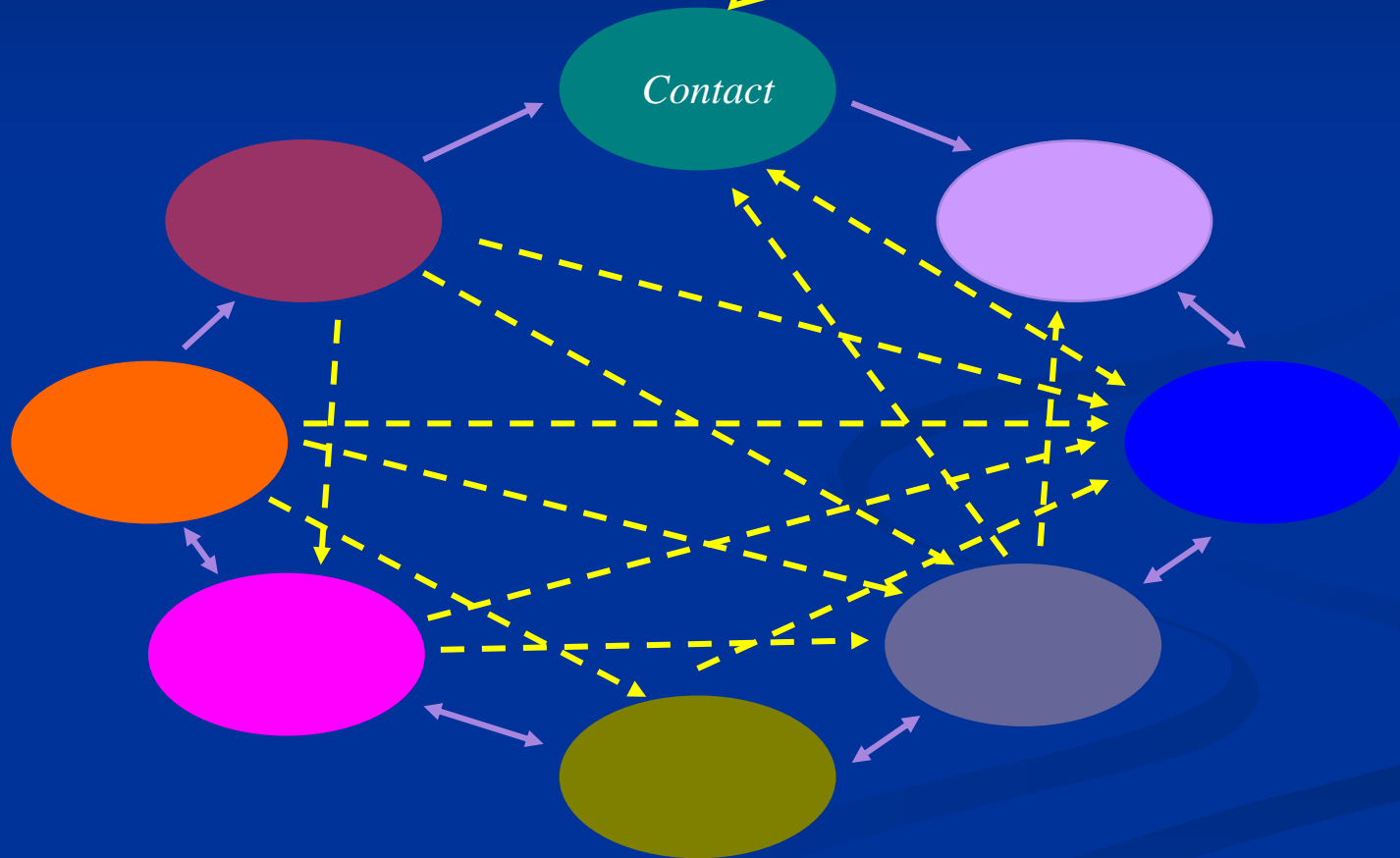


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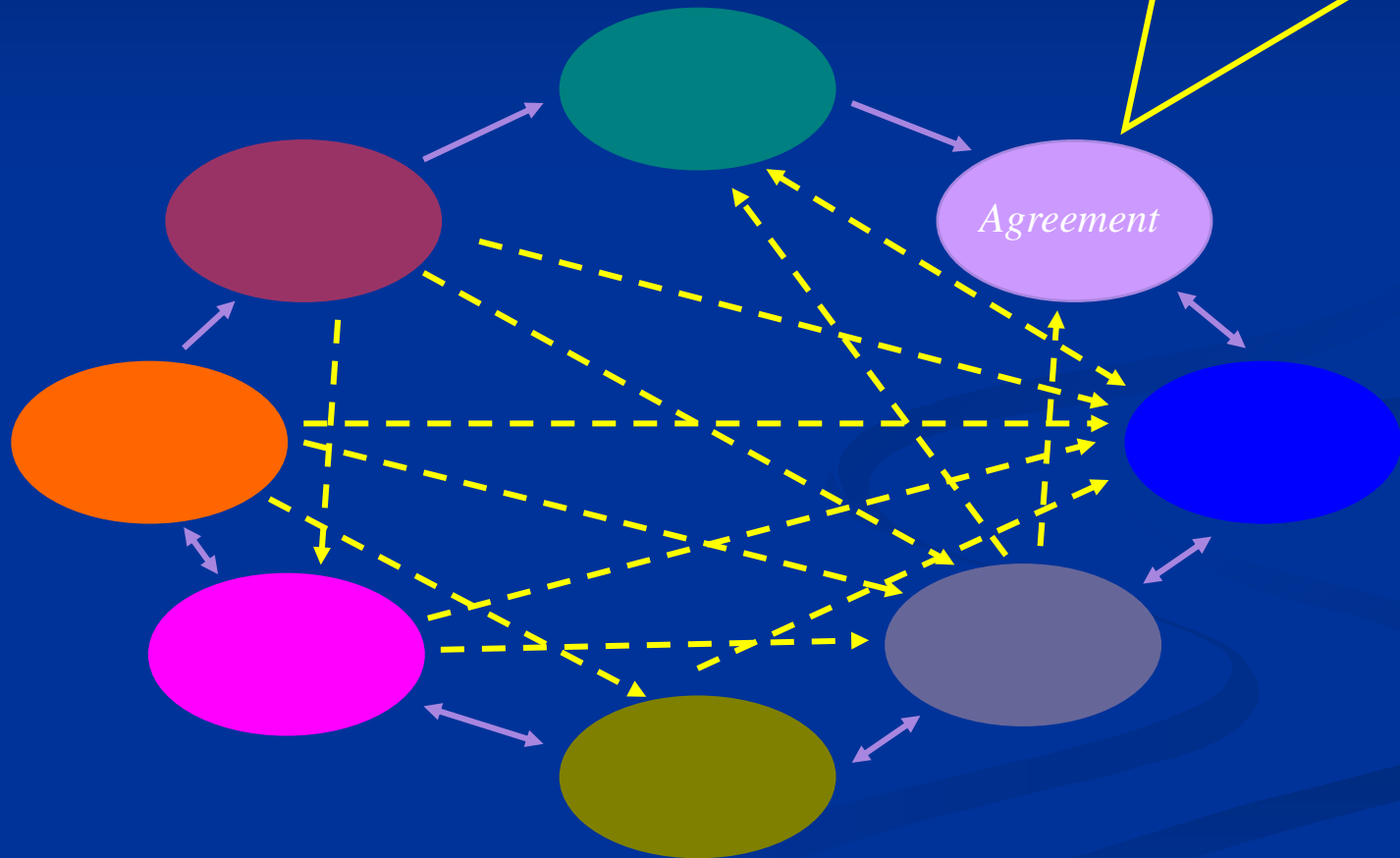
# Eight Phases of the Consulting Process

Seek an understanding of the client's organization or business need; lay the foundation of the consultant-client relationship.



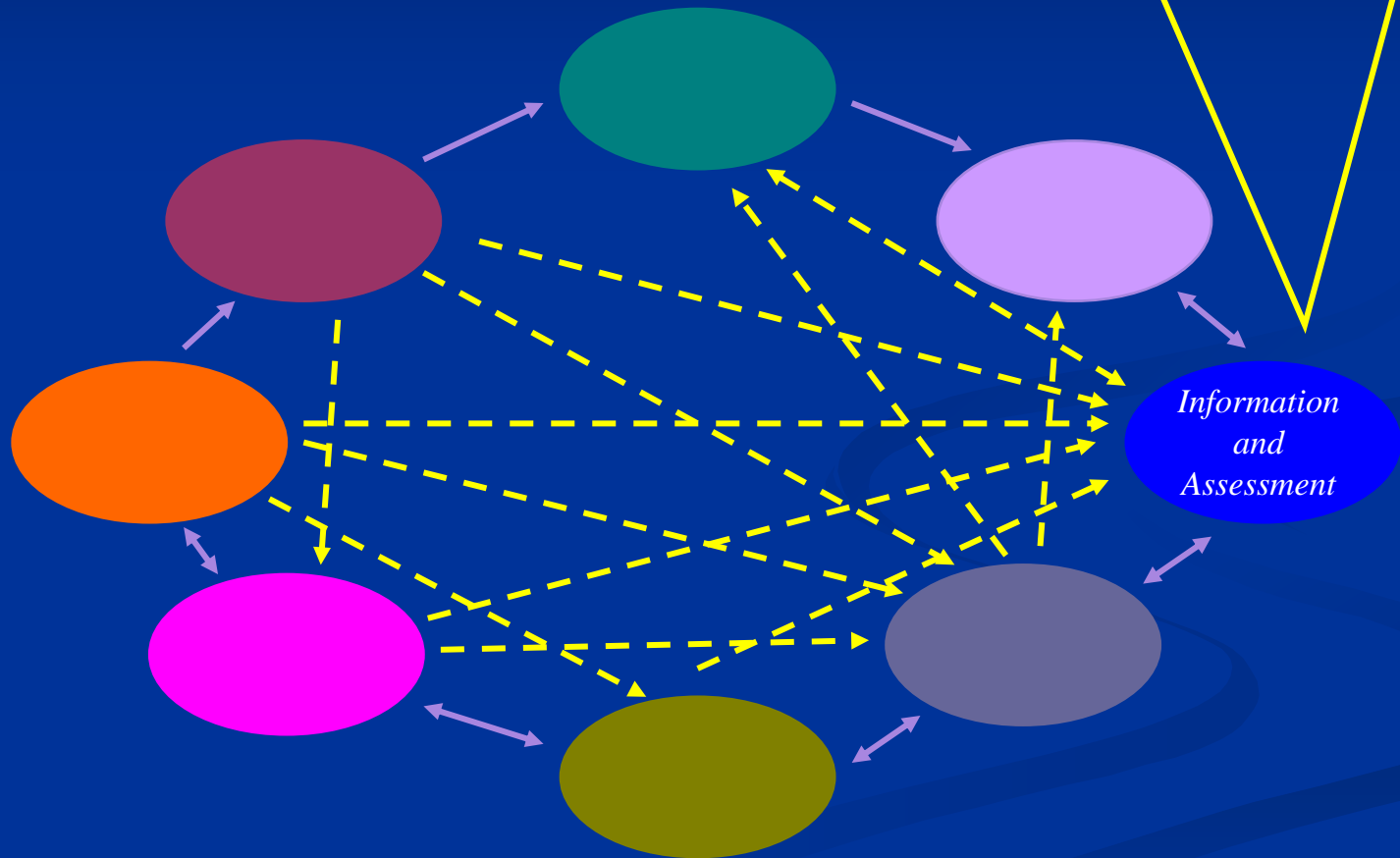
# Eight Phases of the Consulting Process

Confirm the agreement on consultant and client roles, expectations, and the actions each will take. Define the need to be addressed and the goal or outcome to be achieved.

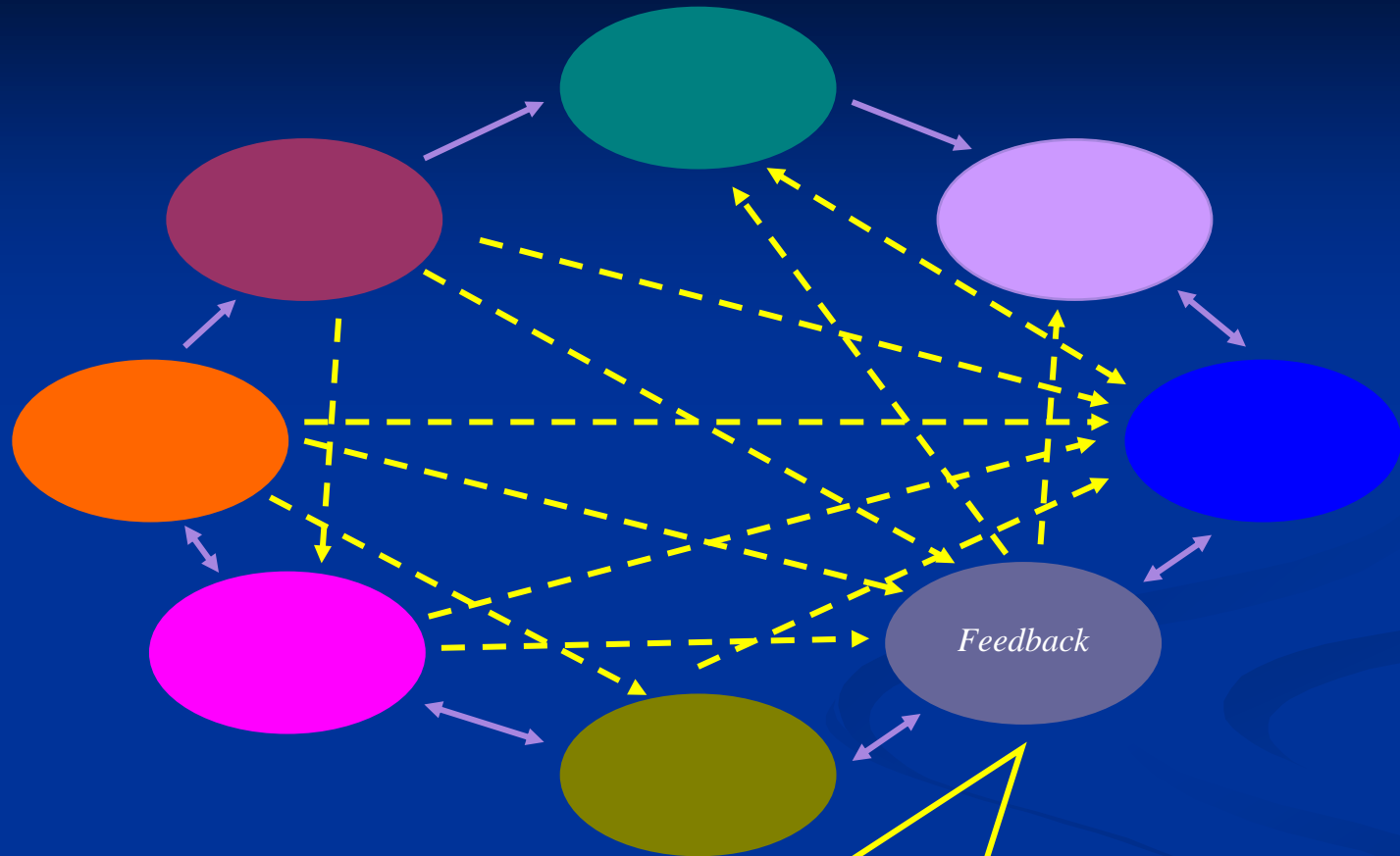


# Eight Phases of the Consulting Process

Gather information about the issue, the business, performance, and the organization. Assess or analyze the data and information collected. Gain an independent view and interpretation of the issues.

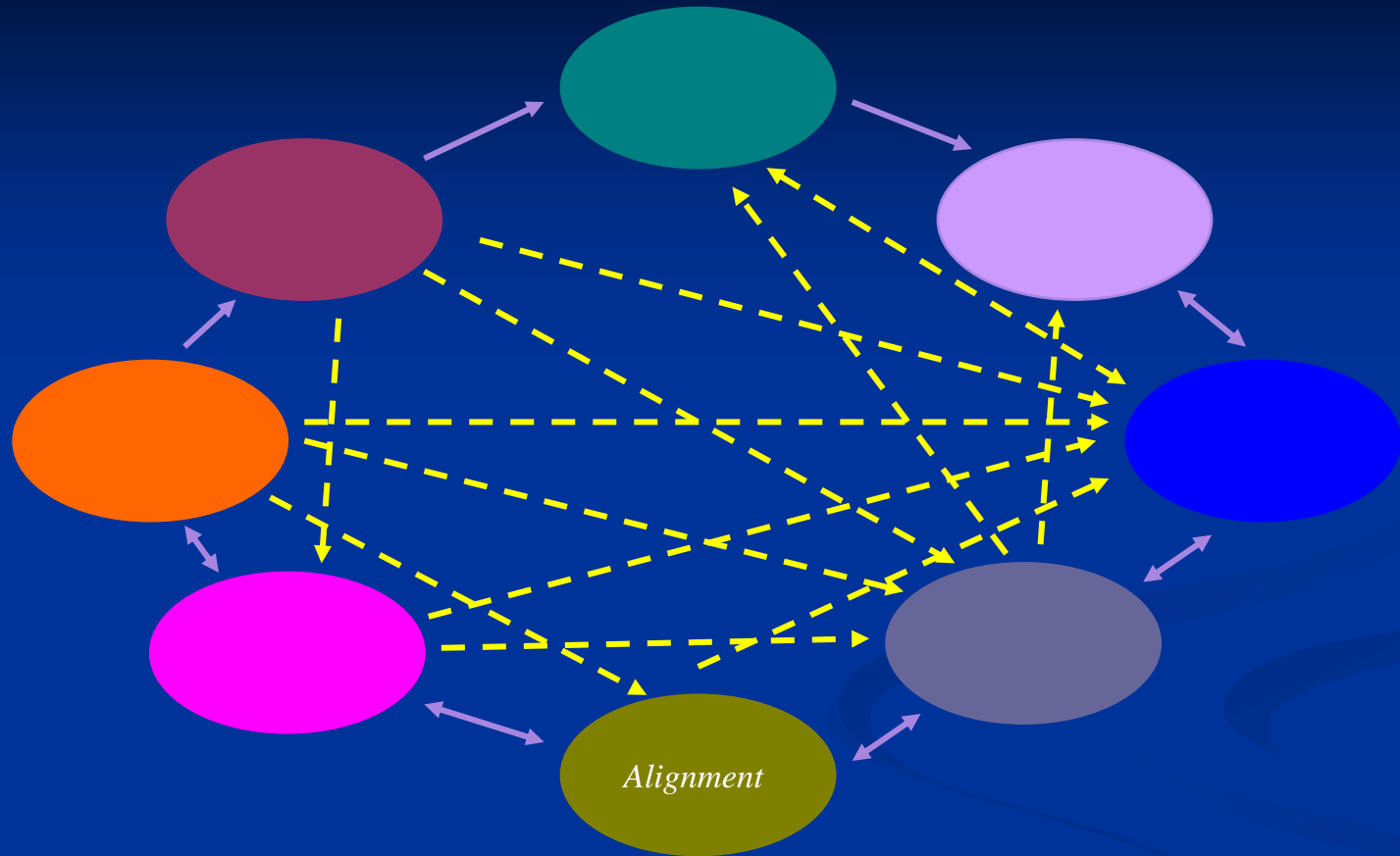


# Eight Phases of the Consulting Process



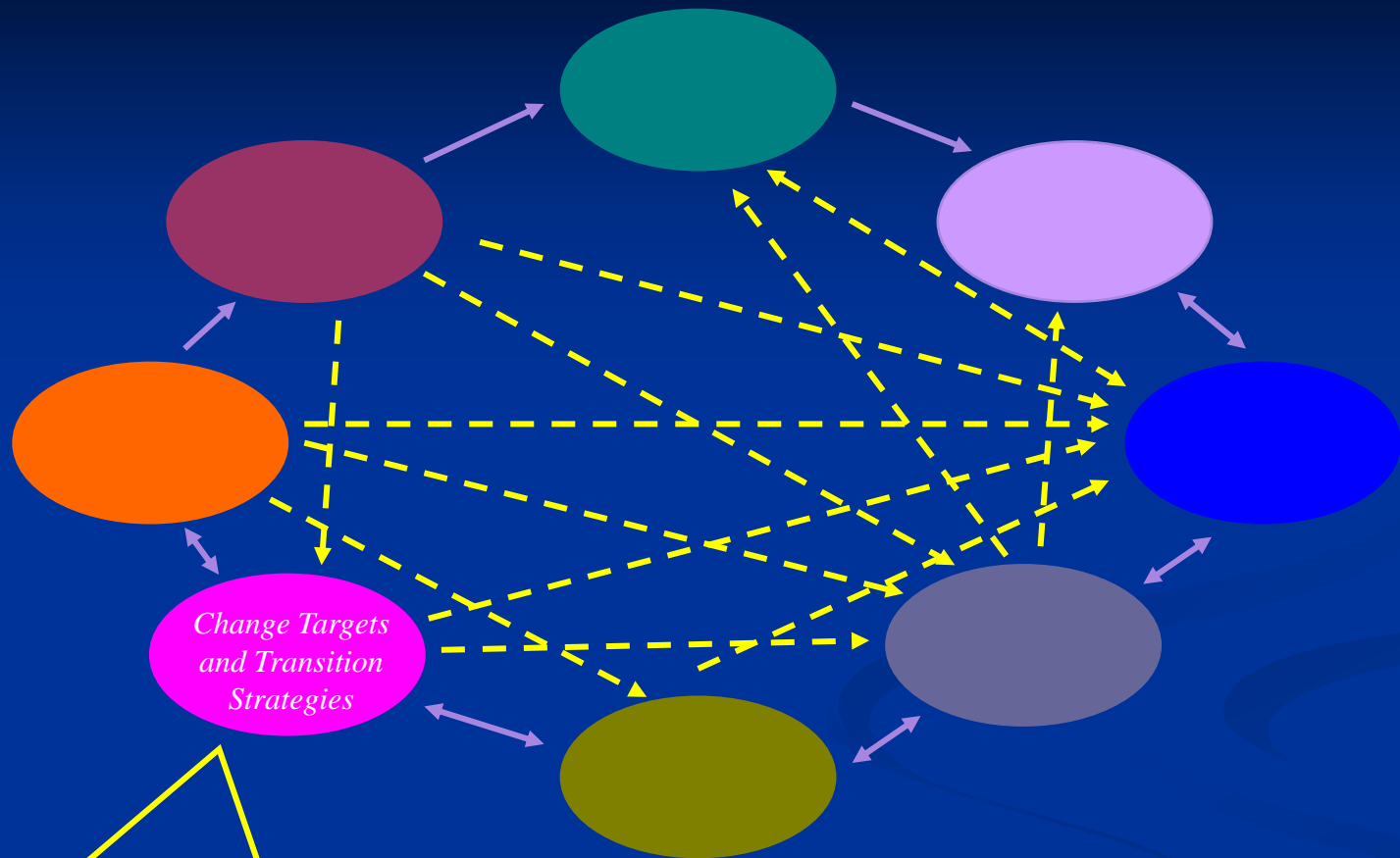
Provide the client with the information or data;  
seek acceptance or “ownership” of the data.  
Offer a consultant’s analysis or interpretation.

# Eight Phases of the Consulting Process



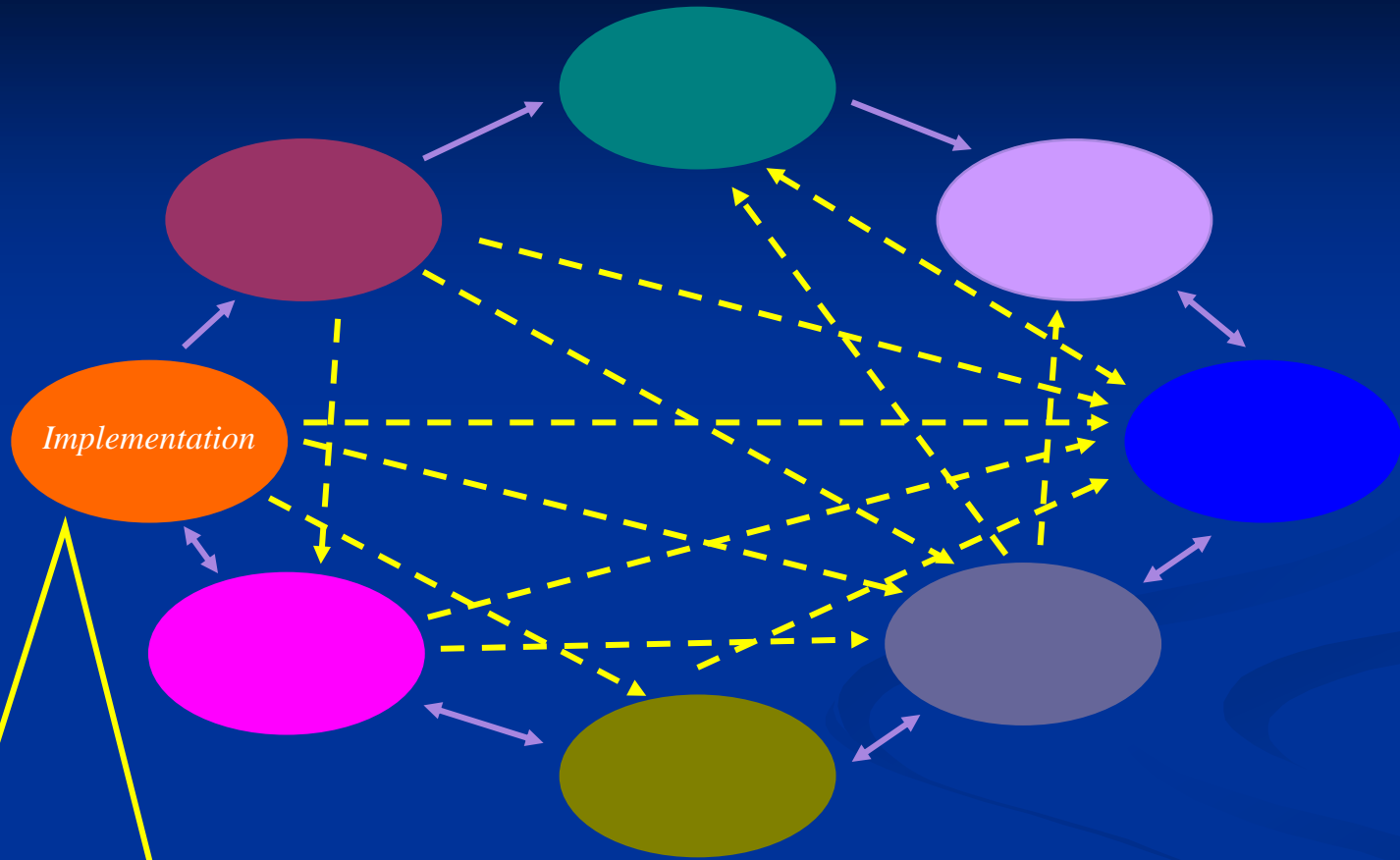
Seek alignment with the client on the desired outcomes or future state and the approach or intervention to be used to achieve it.

# Eight Phases of the Consulting Process



Clarify which components of the system need to be changed, and identify necessary support and resources. Develop a transition strategy to navigate from the current state to the desired future.

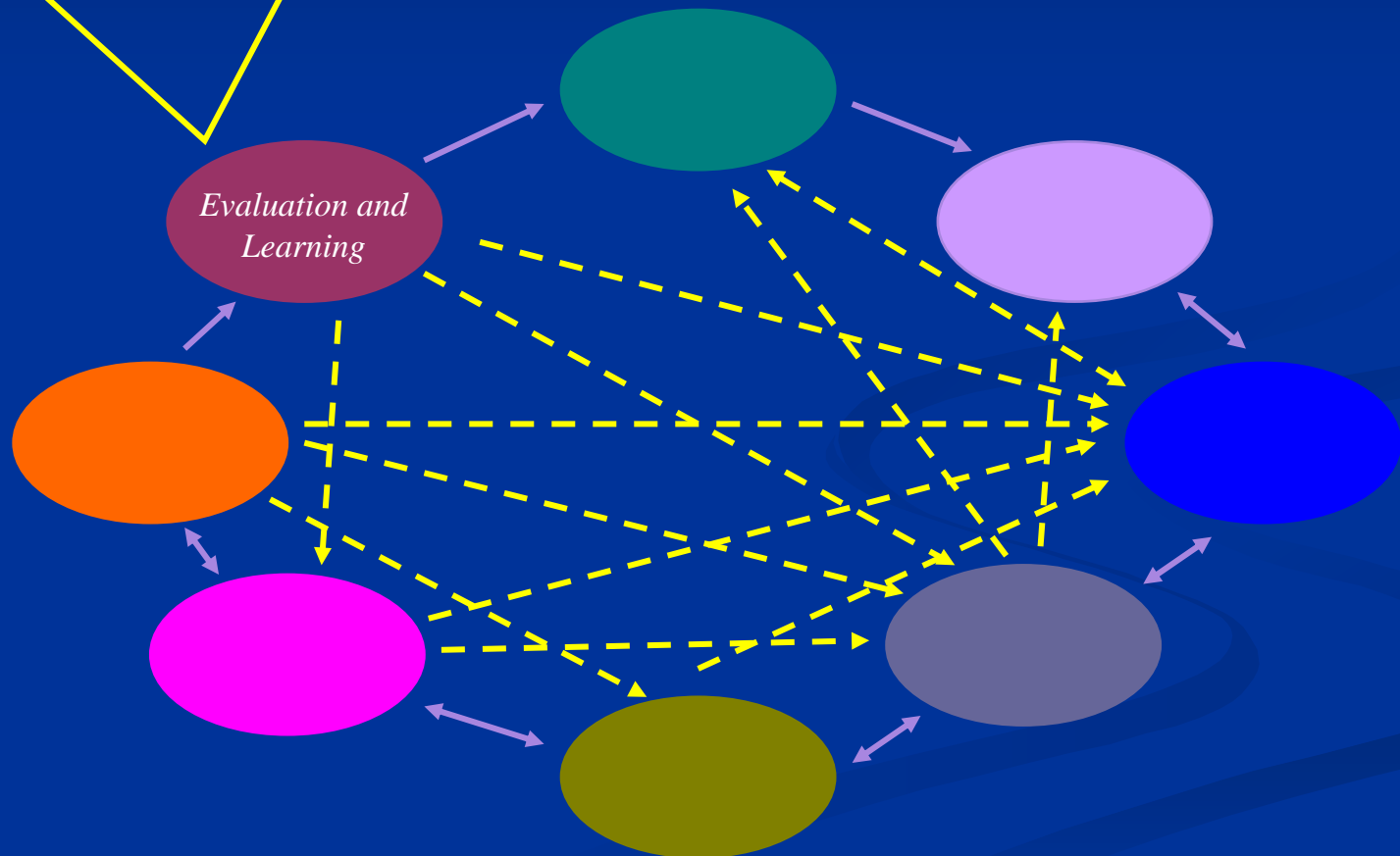
# Eight Phases of the Consulting Process



Complete the intervention by providing guidance, coaching, facilitation, and leadership to implement the planned change.

# Eight Phases of the Consulting Process

Evaluate the success of the project with the client system by supporting the client's reflection and identification of learned skills, knowledge, and self-awareness. Explore enhanced knowledge, skills and self-awareness.



# *Eight Phases of the Consulting Process*

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- **Contact:** Seek an understanding of the client's organization or business need; lay the foundation of the consultant-client relationship.
- **Agreement:** Confirm the agreement on consultant and client roles, expectations, and the actions each will take. Define the need to be addressed and the goal or outcome to be achieved.
- **Information and assessment:** Gather information about the issue, the business, performance, and the organization. Assess or analyze the data and information collected. Gain an independent view and interpretation of the issues.
- **Feedback:** Provide the client with the information or data; seek acceptance or "ownership" of the data. Offer a consultant's analysis or interpretation.
- **Alignment:** Seek alignment with the client on the desired outcomes or future state and the approach or intervention to be used to achieve it.
- **Change targets and transition strategies:** Clarify which components of the system need to be changed, and identify necessary support and resources. Develop a transition strategy to navigate from the current state to the desired future.
- **Implementation:** Complete the intervention by providing guidance, coaching, facilitation, and leadership to implement the planned change.
- **Evaluation and learning:** Evaluate the success of the project with the client system by supporting the client's reflection and identification of learned skills, knowledge, and self-awareness. Explore enhanced knowledge, skills and self-awareness.

# *Client / Consultant Agreements*

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- Why Use Them?
- Who Is Involved?
- What Is Included?
  - Clarifying Expectations
  - Outcomes and Goals
  - Process and Timeline
  - Logistics
  - Resources
  - Organization Support
  - Confidentiality

# *Internal Marketing*

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- What Is It?
- Is It Needed?
- Strategy
- Relationship Building
- Maintaining Credibility
- Business Partner
- Internal Staff Functions
- Publishing Successes

# The Role Dilemma

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## Expert or Process Consulting

**Expert Approach:** *Uses data collection, analysis to determine solutions. Traditional business consulting model.*

**Process Consulting:** *Relies on intuitive awareness of consultant who attends to and observes emotional, nonverbal, perceptual and special aspects of human behavior.*

# The Role Dilemma

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## Alternatives:

- ***Committed Partner***: serves the client with collaborative orientation
- ***Change Leader***: offers strong facilitation and organization influence
- ***Business Driver***: emphasizes performance management and results
- ***Trusted Advisor***: serves as confidant and provides authentic communication
- ***Grounded Expert***: has specific expertise
- ***Insightful Observer***: applies systems thinking and rigorous inquiry

Excerpt from "Consulting on the Inside", by Bev Scott, ASTD Publishing, 2000

# *Setting the Stage at Hiring*

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- Entry Charter
- Reporting Agreements
- Access to Senior Levels
- Parameters

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# *Navigating the Hierarchy*

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- Politics and the Hierarchy
- Boss-Subordinate Relationship
- Internal Consultant Status
- Partnering with Other Functions
- Change in Leadership

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# *Internal Consultant Competencies*

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- Resourceful
- Initiative
- Organizational Savvy
- Credibility

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# *Internal Consultant Competencies*

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- Collaborative
- Understands the Business
- Maintains Detachment
- Marketing

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