

# Beyond Training and Into Consulting

ASTD  
Golden Gate Chapter

July 9, 2003

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# What is A Consultant?

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*A consultant uses...*

- Expertise
- Influence
- Personal Skills

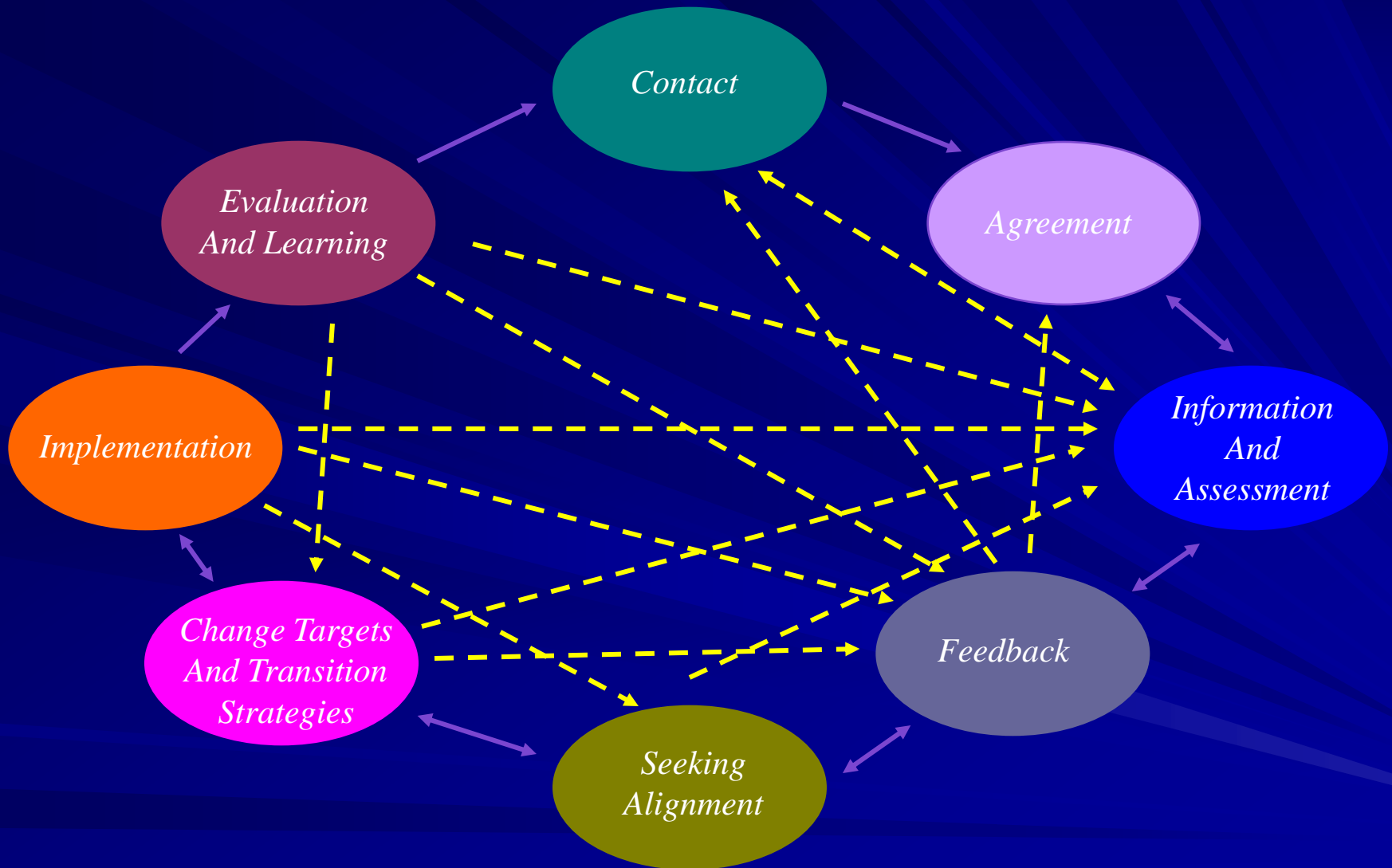
*To facilitate...*

A  
Client  
Requested  
Change

*Without formal authority to implement recommended actions*

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

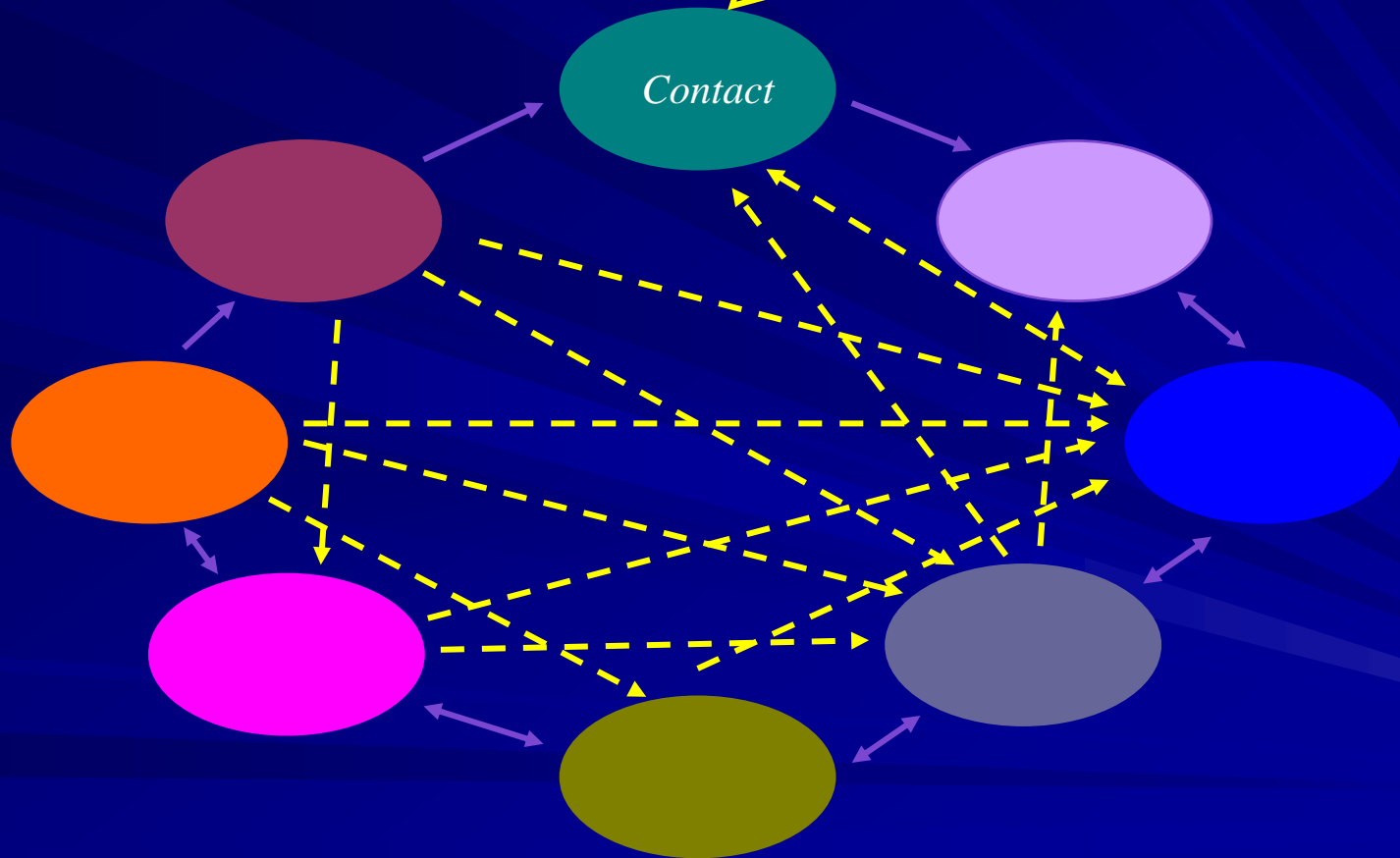
# The Process of Consulting



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

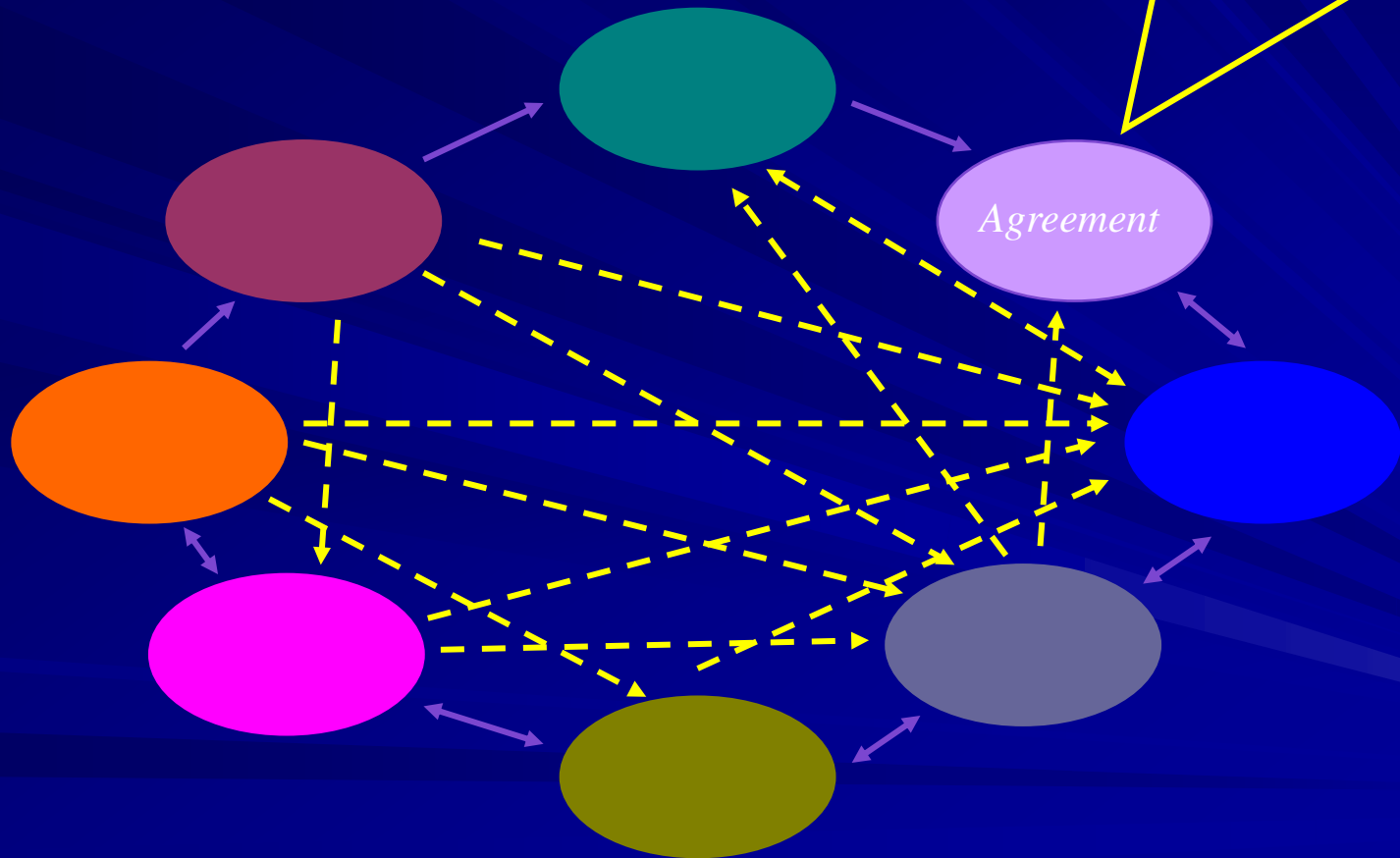
# Eight Phases of the Consulting Process

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



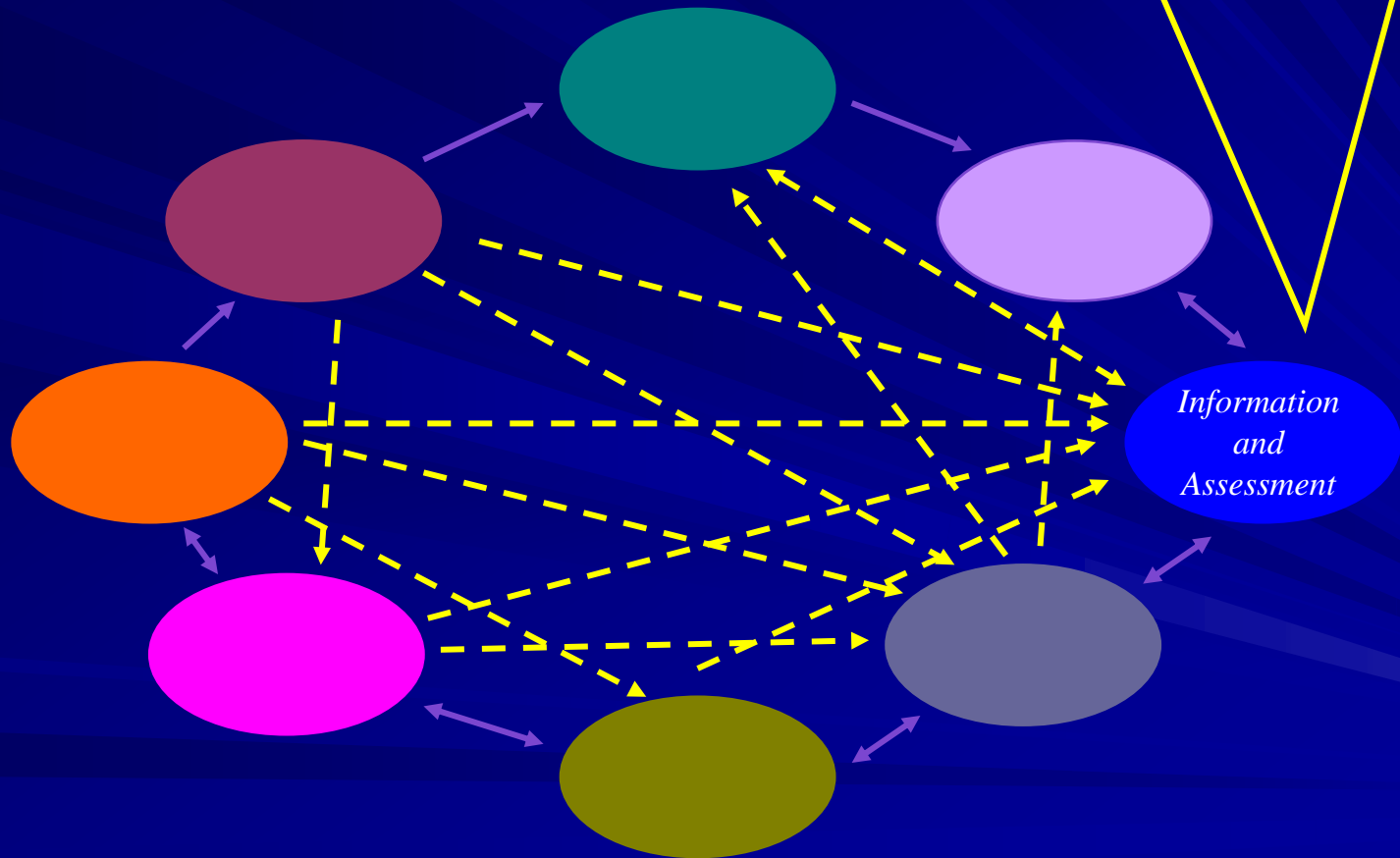
# Eight Phases of the Consulting Process

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.

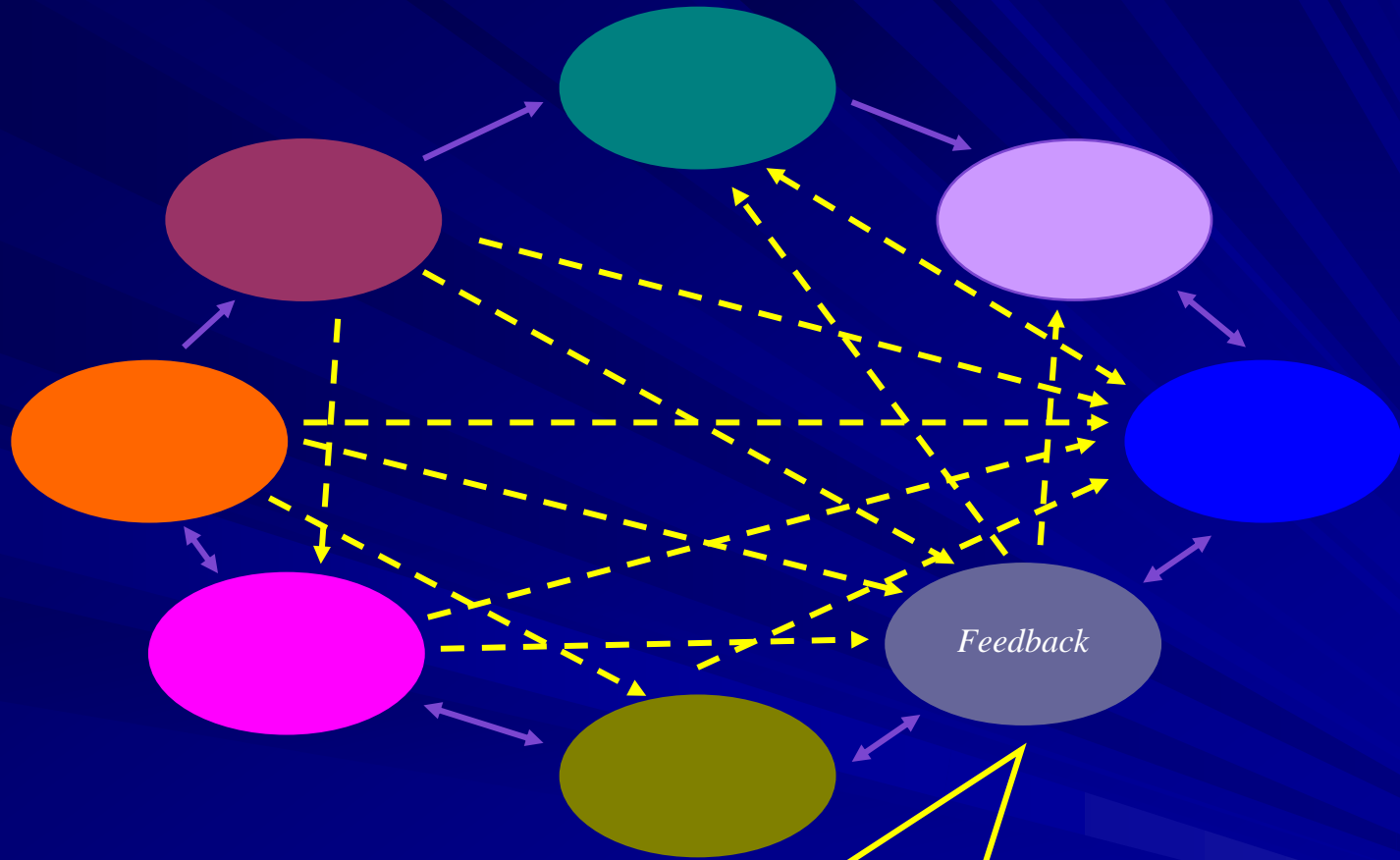


# Eight Phases of the Consulting Process

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.

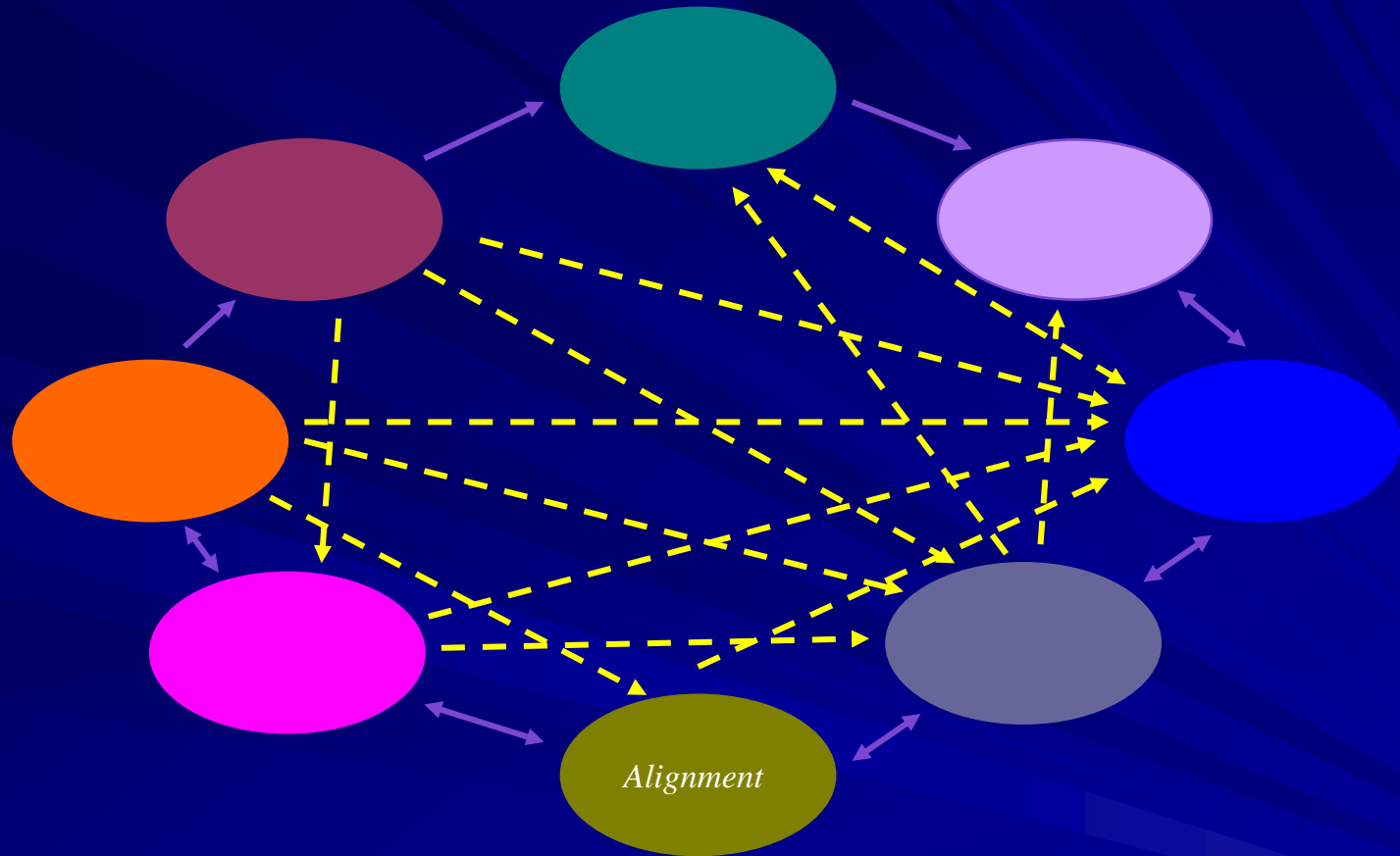


# Eight Phases of the Consulting Process



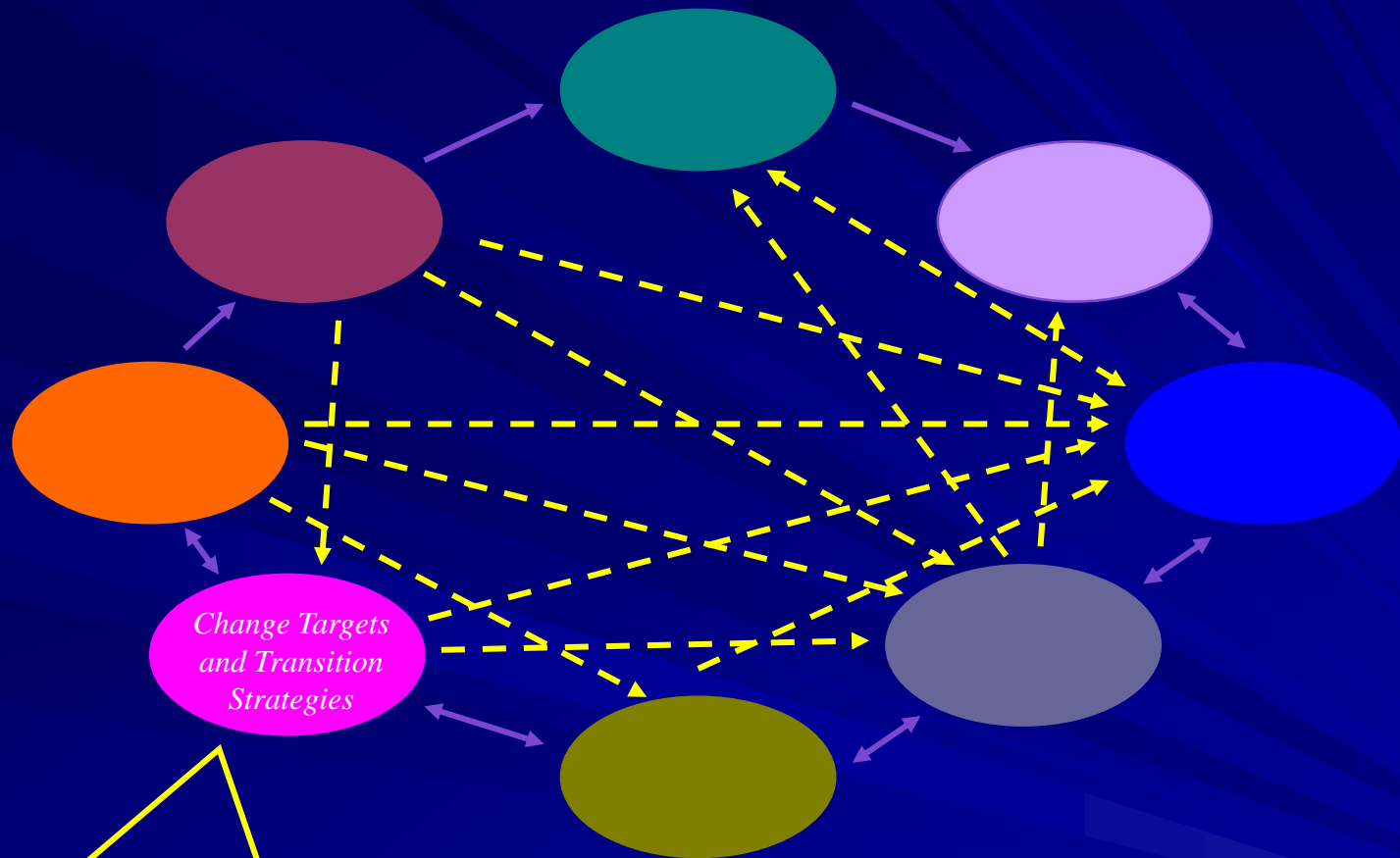
Provide the client with the information or data;  
seek acceptance or “ownership” of the data.  
Offer a consultant’s analysis or interpretation.

# Eight Phases of the Consulting Process



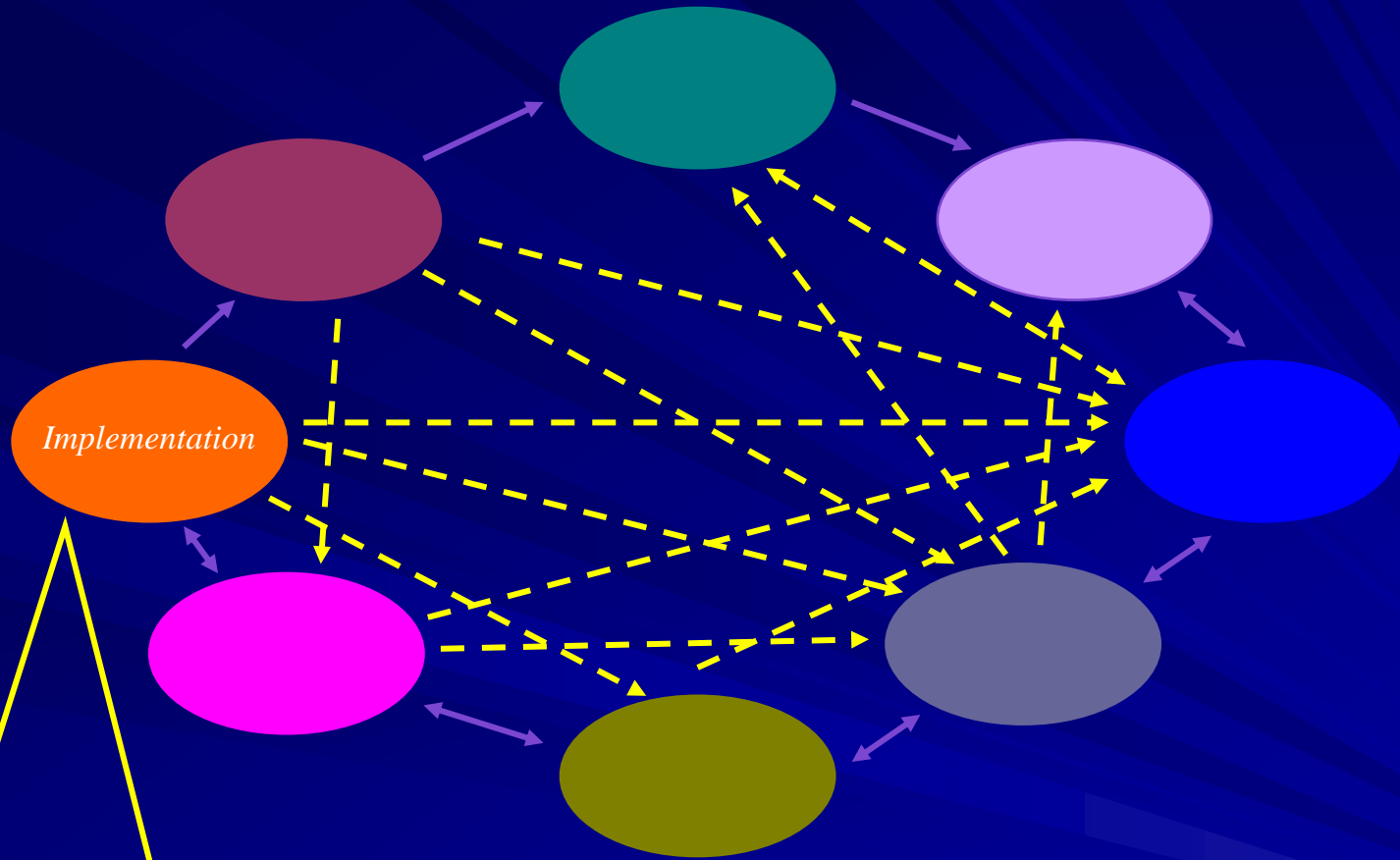
Seek alignment with the client on the desired outcomes or future state and the approach or intervention to be used to achieve it.

# 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.

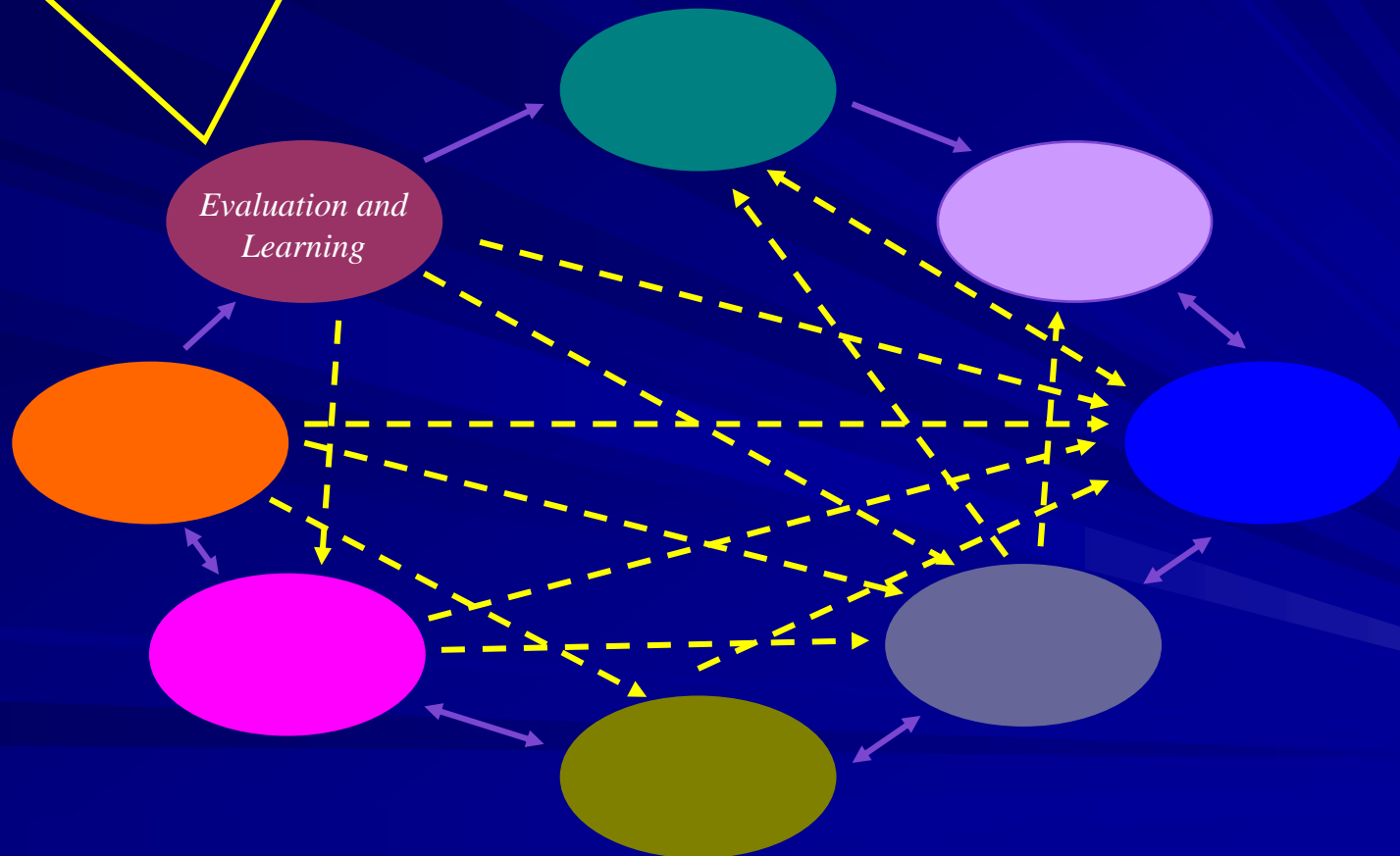
# Eight Phases of the Consulting Process



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.



# *Key to Success in First Meeting*

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- Setting stage with First Contact
- Build relationship
- Clarify support with multiple clients
- Explore client readiness
- Approach with spirit of inquiry

# *Expanding Training Requests*

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- Ask questions:
  - Desired results / outcomes
  - Motivation / reason for request
  - Previous experience
  - Other related initiatives
- Exploring the performance / business need
- Request to collect data / information
- Use request to get foot in the door
- Agree to connect to other initiatives

# *Potential Questions for First Meeting*

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- What is the background that led to your decision to call me?
- What business issues are you currently facing? What is the background?
- What employee/organization/performance issues are you currently addressing? What is the background?
- How is this issue affecting the business, customers, or employee results?
- How is it affecting the employees and the ability of the team or the organization to function effectively?
- What motivates you to make changes in performance, the organization, or business processes?
- What has been successful in the past?
- What have you done or tried so far?
- What is working now?

# *Potential Questions for First Meeting*

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- If these issues were resolved what would the business / organization / performance look like?
- What are your ideal performance outcomes / results?
- What is driving or motivating your interest in this effort?
- What did you learn from...(a recent effort similar to the one we are discussing)?
- What may impede or get in the way of accomplishing the desired outcomes?
- Who else needs to be involved in this project?
- May I talk to your boss / employees / colleagues to get a broader perspective?
- I would like to spend time on the shop floor / riding with the sales team / listening in on customer calls / or \_\_\_\_\_ to learn more about your business. Can you set that up for me?

# *Range of Competence*

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1. Student - Learning basic knowledge and concepts
2. Apprentice - Applying knowledge; Developing skills
3. Practitioner - Increasing knowledge and skill base
4. Coach & Mentor - Assisting others to develop
5. Mastery - Leaving your own mark and legacy

# Competencies Needed as a Consultant

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A consultant uses...

- **Expertise**
- Influence
- Personal Skills

## What is your expertise?

- Platform skills
- Organization psychology
- Change Methodology / Tools
- Adult Learning
- Group and Team Dynamics Facilitation
- Training Design

# Competencies Needed as a Consultant

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A consultant uses...

- Expertise
- **Influence**
- Personal Skills

## What are Your Strengths?

- Involving participants
- Gaining commitment
- Building trusting relationships
- Awareness of personal feeling
- Prepare leadership for truth

# Competencies Needed as a Consultant

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A consultant uses...

- Expertise
- Influence
- *Personal Skills*

## What are Your Strengths?

- Listening
- Maintaining confidentiality
- Resolving ethical issues with integrity
- Managing personal bias and defensiveness
- Openness and authenticity
- Sense of humor

# Competencies Needed as a Consultant

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*A consultant uses...*

- Expertise
- Influence
- Personal Skills

*To facilitate...*

## *What are Your Strengths?*

- Managing projects
- Helping clients trust the process
- Clarify outcomes
- Building realistic expectations
- Facilitating decision making process

# Competencies Needed as a Consultant

A consultant uses...

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To facilitate...

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## What are Your Strengths?

- Connect to Business / Performance Drivers
- Link project to organization strategies / initiatives
- Perform in atmosphere of ambiguity and chaos
- Collaboration
- Avoid personal needs / agendas

# Competencies Needed as a Consultant

A consultant uses...

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**Without formal authority to implement recommended actions**

## What are Your Strengths?

- Recognize and utilize informal power
- Leadership
- Initiative
- Assertiveness
- Clear Communication
- Teamwork
- Developing agreements
- Developing commitment and accountability
- Consulting mindset