

# ***Consulting on the Inside***

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# *Learning Objectives*

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- Move past personal and organizational roadblocks to achieve results
- Manage the eight phases of consulting to execute hi-impact outcomes
- Position consulting as a strategic partnership beyond a “support” function
- Assess the client’s readiness to commit and follow through
- Deliver feedback for discussion and action planning on critical issues
- Reach agreement with clients on a blueprint for improved performance
- Identify current strengths as a consultant and areas for development
- Define strategies to work with strategic, operational and service organization sectors
- Augment internal resources by strategically leveraging external consulting relationships

# Agenda

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- External / Internal Role Comparisons
- Challenges of Consulting
- Consulting Process Model
- Contact Phase
- Feedback Phase
- Alignment Phase
- Achieving Success
- Partnerships
- Self-Assessment and Competencies
- Application Planning
- Closure

# What is A Consultant?

A consultant uses...

- Expertise
- Influence
- Personal Skills

To facilitate...

A  
Client  
Requested  
Change

Without formal authority to implement recommended actions



Internal Journal

*The psychological contract for an internal is qualitatively different. If something goes wrong, you are still in the system. There is a different mentality if you are committed to the system for a long time. You grow up with people, see them evolve, and know their history, fears, and struggles. There is a level of personal vulnerability that is different. Your clients are also your friends and colleagues. It feels quite different, and you cannot easily walk away.*

Sue Thompson, Thompson Group,  
former internal consultant with Levi Strauss & Company

# Choosing a Role

- Emphasize Process or Expertise?
- Advice:
  - Know Yourself as a Consultant
  - Who is your Client?
  - What is the Relationship?
  - What is the Organization Situation or the Project?



Internal Journal

*I am the enabler, supporter, consultant, sounding board, neutral coach, and facilitator. I am often perceived as a leader for a initiative even though I am acting in partnership with someone in the organization. I am perceived as the initiator of the project, because I am seen as the leader. I try to turn it over to the line person quickly. If I am perceived as driving it too much, I back off. It's a fine line. The critical piece is maintaining neutrality. I try to represent all views and bring them to the table. I want the group to decide collectively. Even when I am in the position of a project leader, I maintain the role as a facilitator.*

Mila N. Baker, system director, learning and organization development,  
Baptist / St. Vincent's Health System

# Value Consultants Bring

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- specific skills and expertise
- business knowledge and experience
- objective viewpoint
- deep understanding of the process of change
- strong commitment to learning
- passion about their work
- ability to influence and lead others
- accountability to help solve organizational problems
- innovative, cutting edge, best practice ideas
- supplement organizational resources
- advice, guidance, sounding board for senior management

# Value Consultants Bring

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*Is there a difference in the roles of external and internal consultants?*

# Comparison of External and Internal Consulting Roles

Differences	
Internals	Externals
Accepted as a member of the “group”, congruent with culture	Sees culture and organization with outsider perspective
Has credibility as an insider	Has credibility as an outsider
Knows organization and business intimately	Brings broader experience from other organizations
Can build long term relationships; establish rapport more easily	Can confront, give feedback, take risks with senior management more easily
Coordination and integration of project into ongoing activities	Focused involvement on a project which ends
Opportunities to influence, gain access, sit at the table as an insider	Once invited in as an outsider, broader experience offers credibility, power and influence
Leverages and utilizes informal and formal organization structure	Can avoid or ignore the organization structure, move around organization to achieve results

# Comparison of External and Internal Consulting Roles

Differences	
Internals	Externals
Leads from position and character (trust)	Leads from competence (expertise) and personality
Knows the cultural norms that should not be violated	Can acceptably challenge or violate the informal rules of the culture
Knows the history, traditions and where “bones are buried”	Seen as objective and not part of the problem
Can take an advocacy role	Brings more objectivity, neutrality
May be expected to be a broad generalist	Often seen as a specialist with narrow expertise
As a “one client” consultant, has a lot more “skin in the game”	If it doesn’t work out here, can always move on to other clients

# Challenges of Consulting

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*What are the challenges and how are they different between external and internal ?*



# *Challenges of Consulting: Internal*

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- Being congruent but marginal
- Multiple roles
- Supporting cast versus starring roles
- Politically neutral or politically savvy
- Boss-subordinate relationship
- The territory is not the map



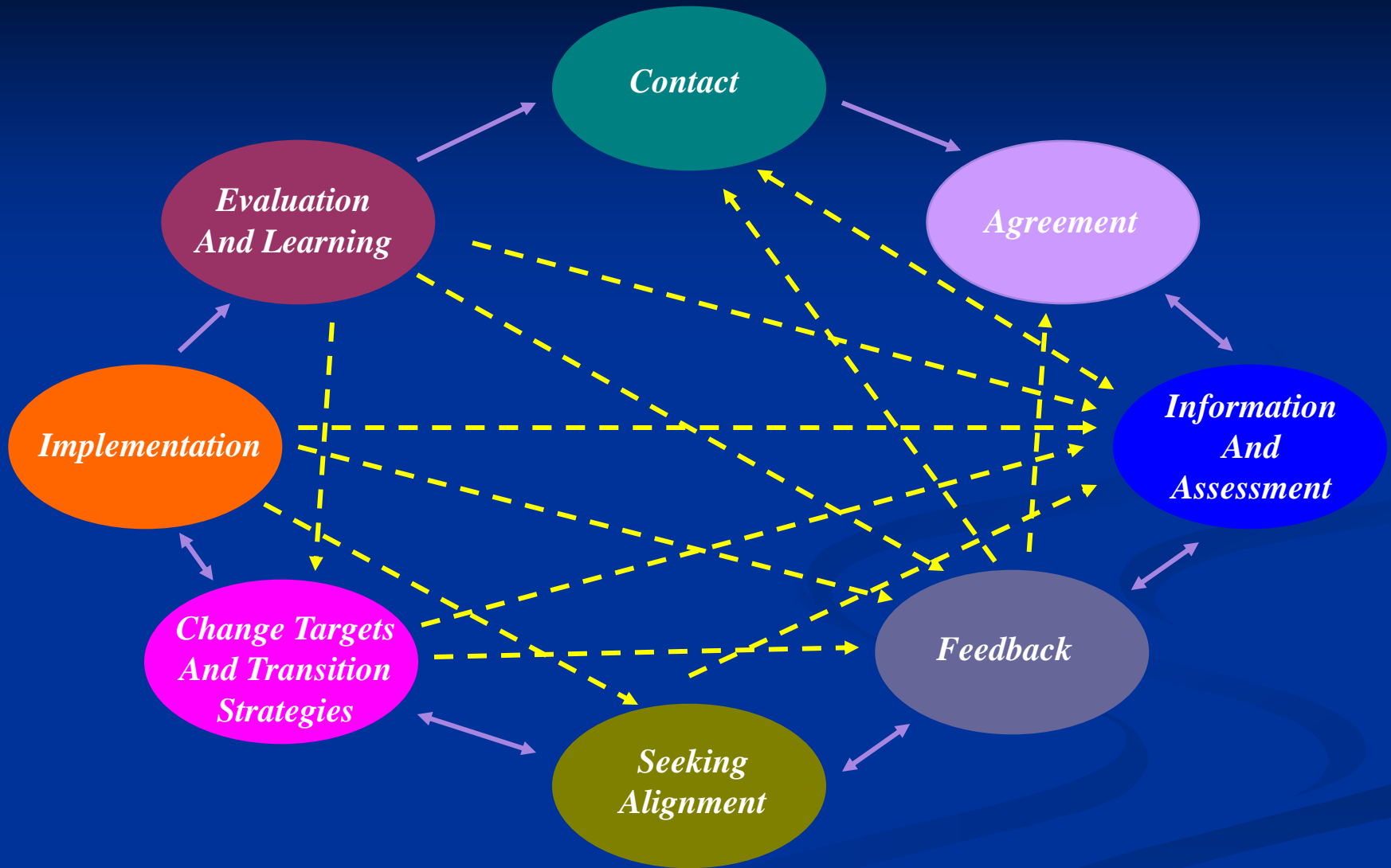
# Challenges of Consulting: External

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- Marketing and selling
- Isolation
- Support Structure
- Financial Stability
- The map is not the territory

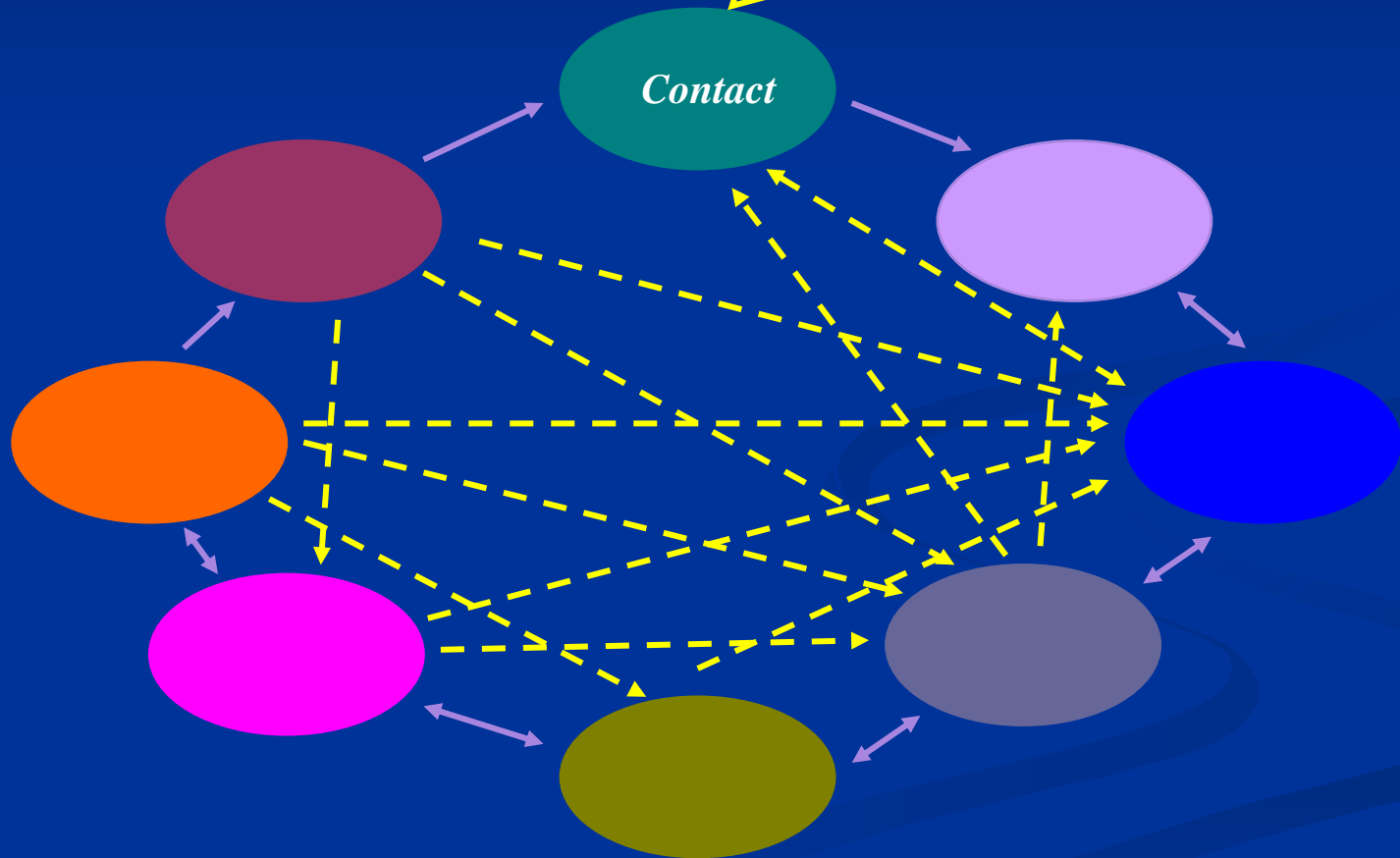


# The Consulting Process



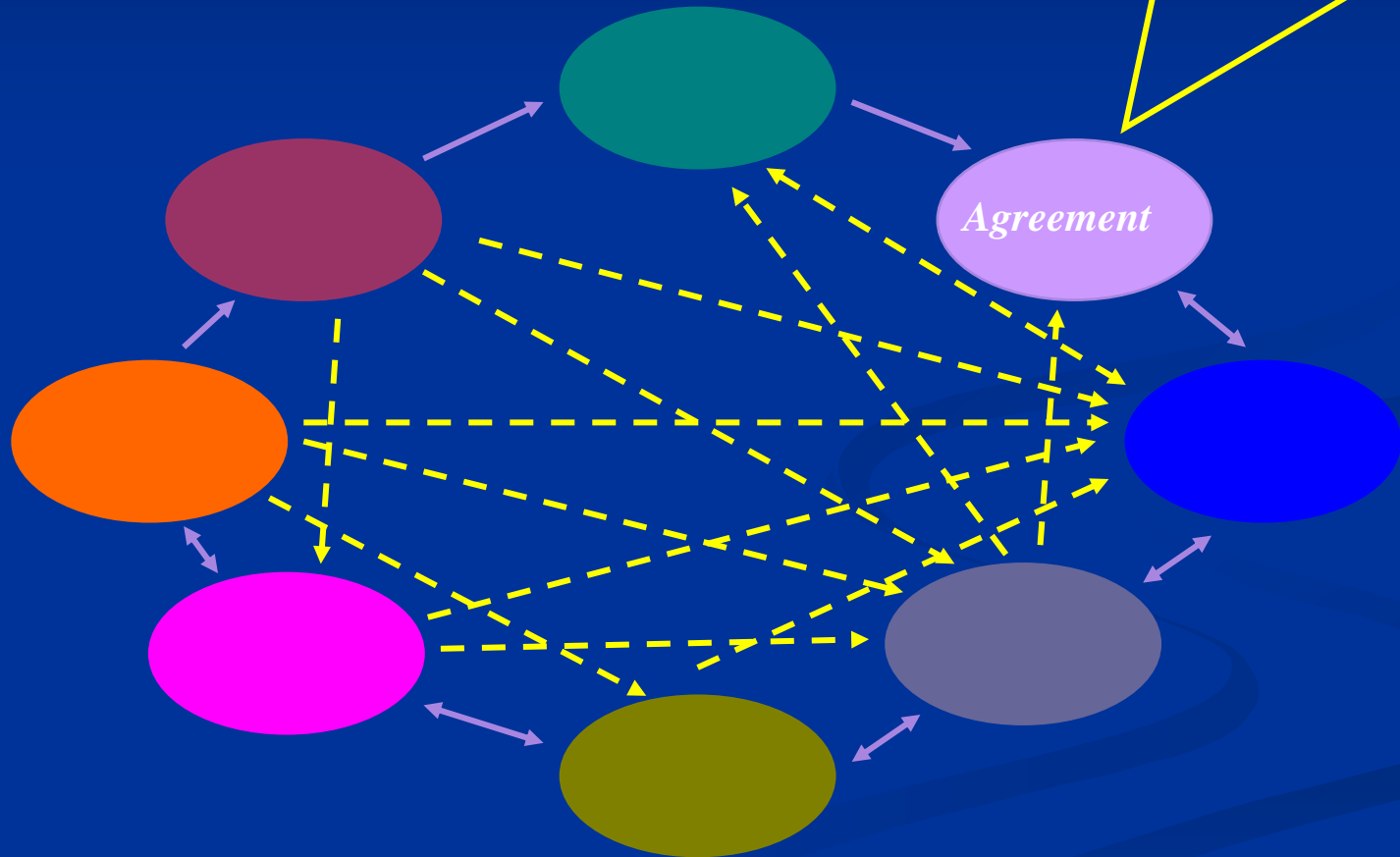
# Eight Phases of the Consulting Process

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



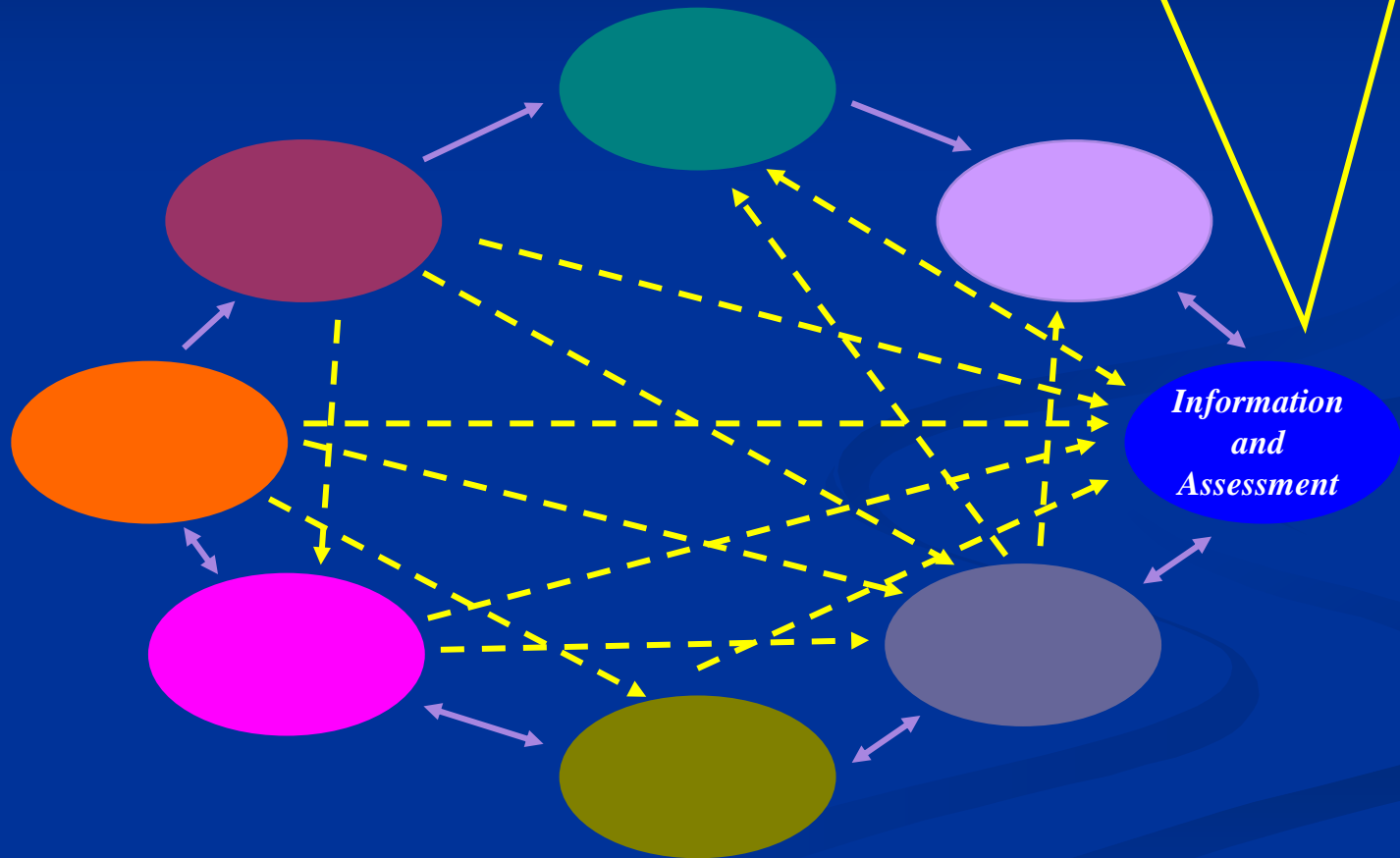
# Eight Phases of the Consulting Process

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.

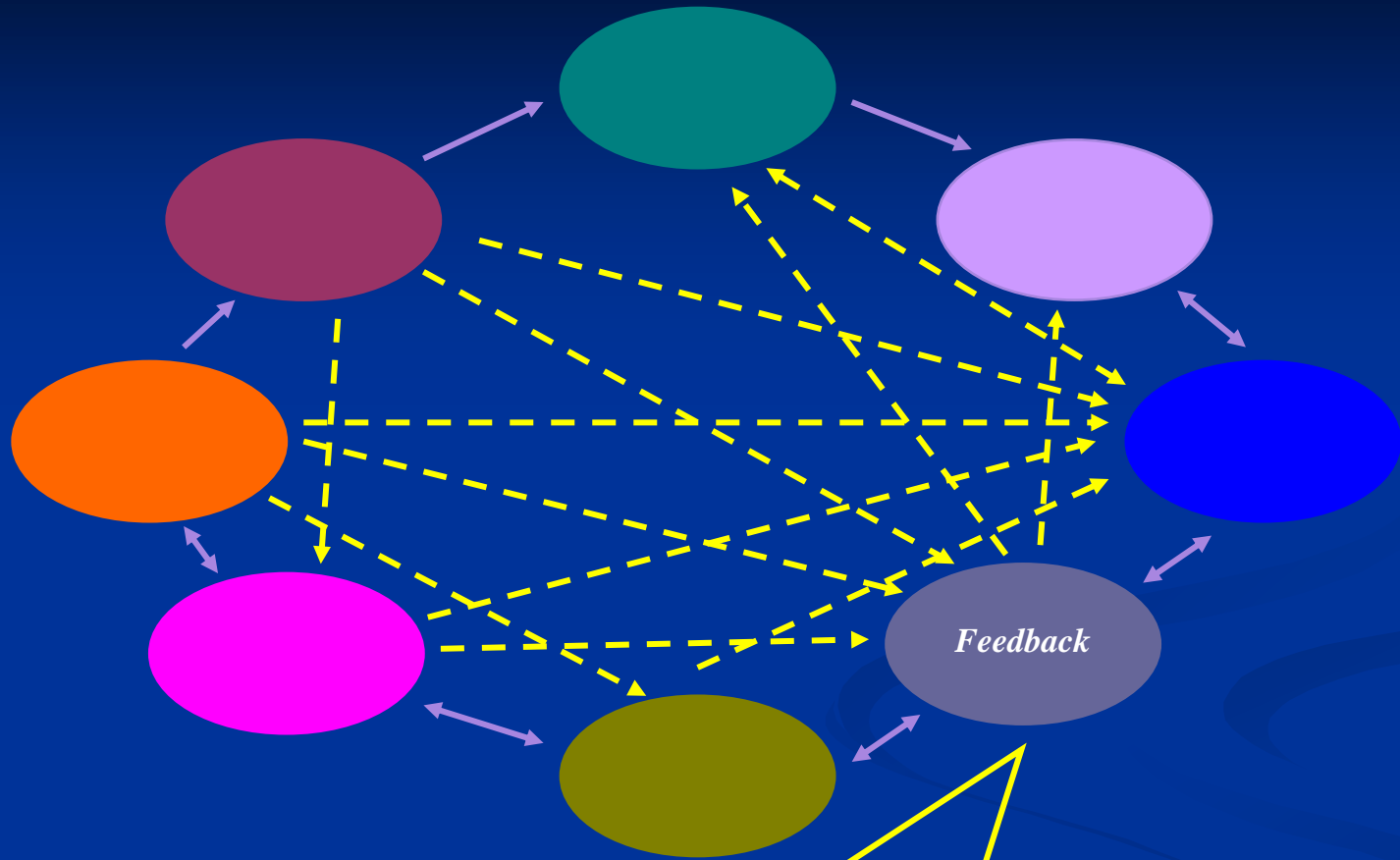


# Eight Phases of the Consulting Process

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.

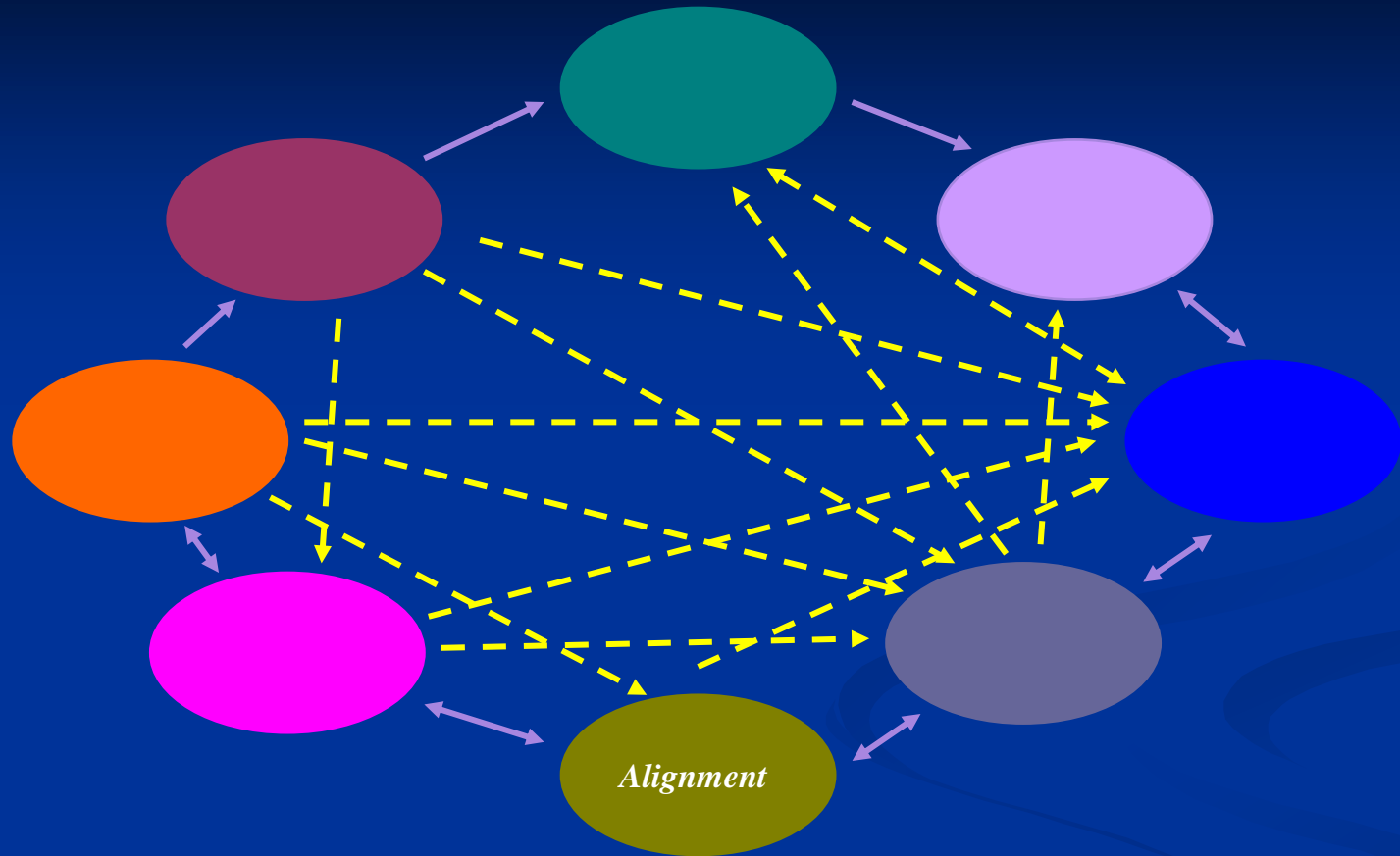


# Eight Phases of the Consulting Process



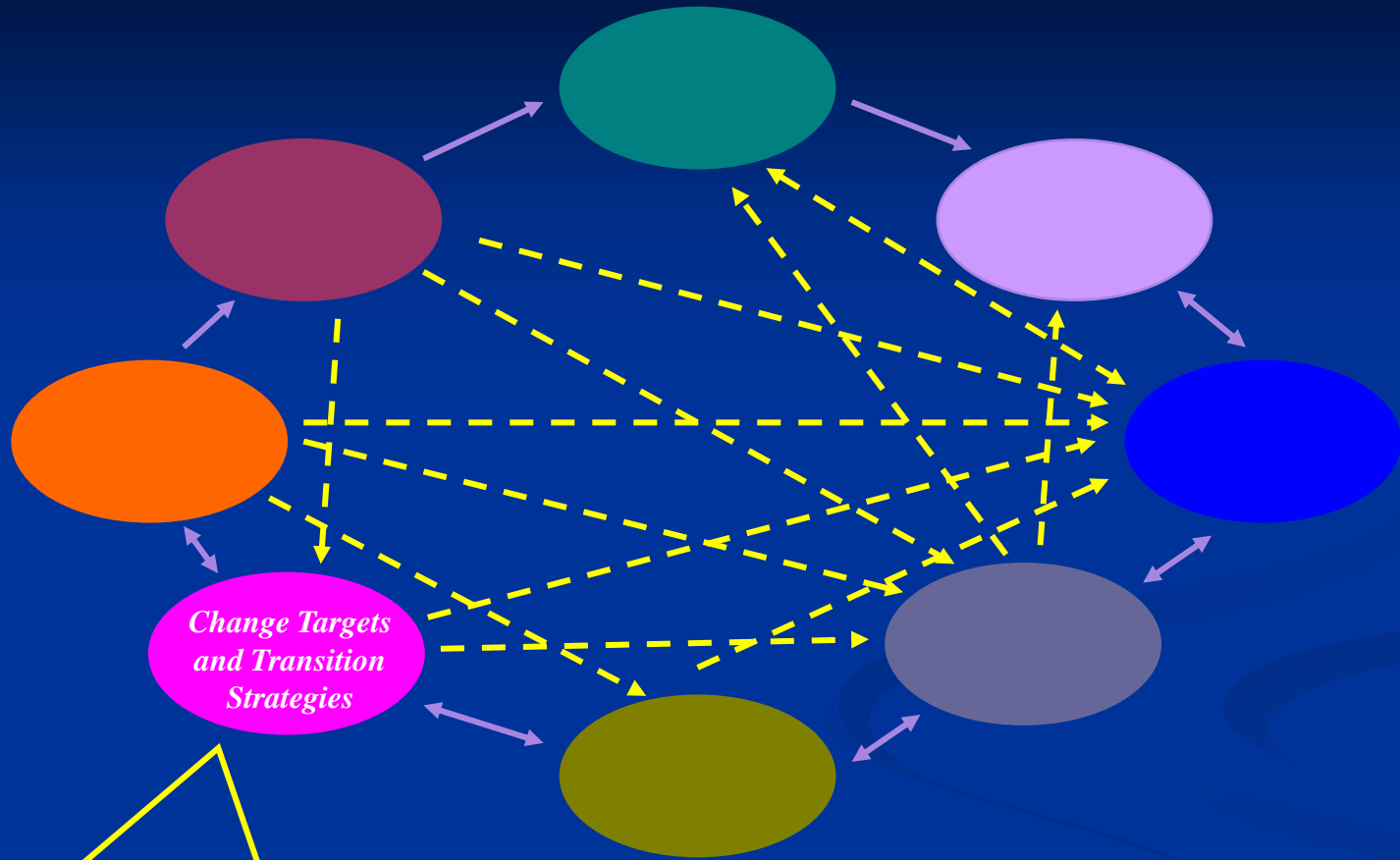
Provide the client with the information or data;  
seek acceptance or “ownership” of the data.  
Offer a consultant’s analysis or interpretation.

# Eight Phases of the Consulting Process



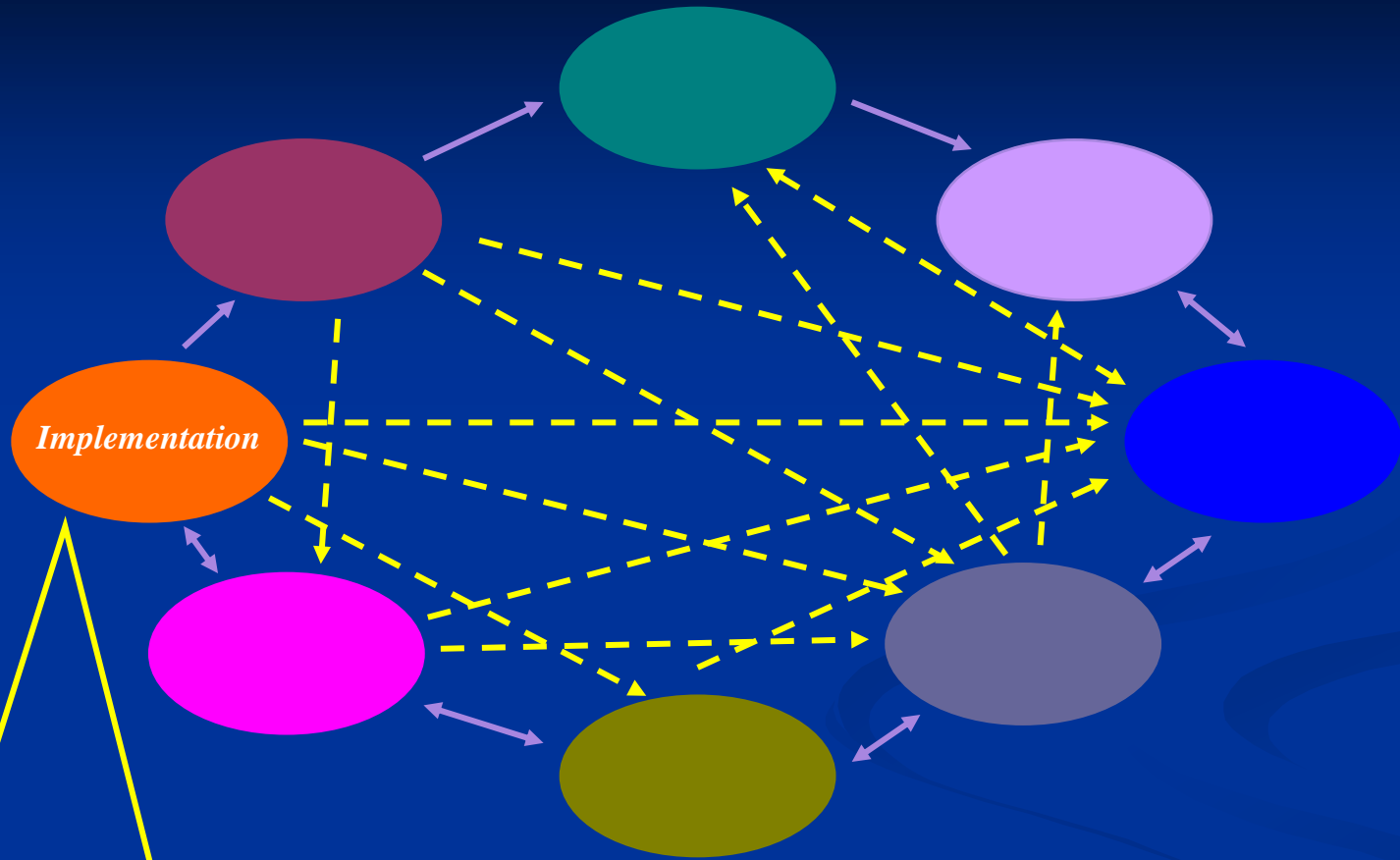
Seek alignment with the client on the desired outcomes or future state and the approach or intervention to be used to achieve it.

# 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.

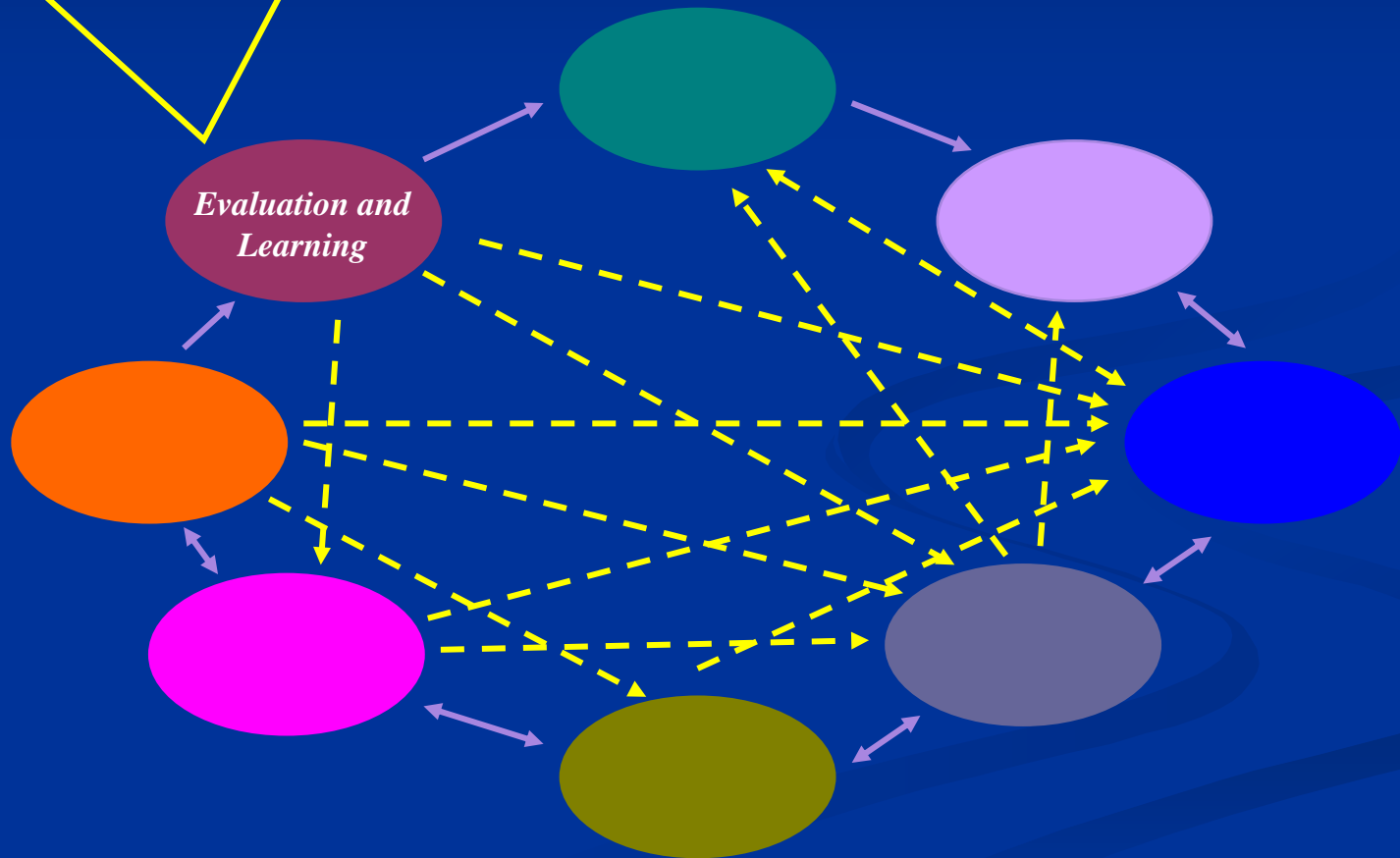
# Eight Phases of the Consulting Process



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.



# *Contact Phase: Successful Completion Requires*

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## *Contact*

- setting the stage at hiring
- building the relationship with the client
- seeking clarity and support from multiple clients
- determining client readiness
- identifying the business or organization need
- approaching this phase with a spirit of inquiry

# Contact Phase: Tips

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*Contact*

- Prepare for the meeting
- Use open-ended questions
- Confront your own fears and issues before the meeting
- Model or practice the behaviors you desire from the client
- Use language and dress that are similar to the style of the client group
- Take a flexible approach and use a style that work with the client
- Clarify any confusion of communication or expectations as it occurs
- Hold difficult meetings at peak performance times
- Use strong interpersonal skills
- Adjust to changes in expectations or plans and be comfortable with ambiguity
- Take notes on both the content and the process

# Feedback Phase

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*Feedback*

- Sensitive Data
- Framing the Data
- Working with Resistance

# Feedback Phase: Sensitive Data

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## Feedback

- Prepare with the needs of the client in mind.
- Do not blame senior management or others.
- Think about possible client objections and resistance to the data. Identify opportunities to bring them to the surface and discuss them.
- Avoid projecting feelings and issues on the client.
- Be willing to confront the tough issues.
- Acknowledge and confirm the positive data in the feedback.
- Remember the data could *be wrong or the interpretation could be off-base.*

# Feedback Phase

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*Feedback*

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# Feedback Phase: Working with Resistance

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## *Feedback*

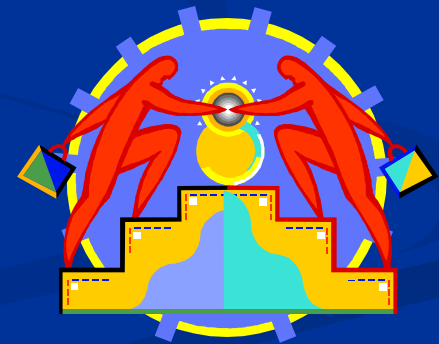
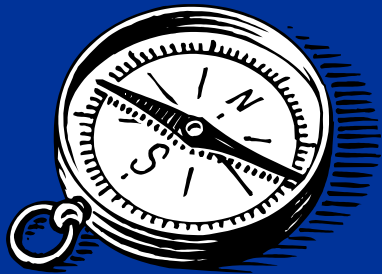
- Do not take it personally
- Respond without arguing in a clear, even tone
- Try rational responses first
- If the resistance continues, state observations or feelings without blame and then be quiet. (This is particularly useful for resisters who are postponing activities or canceling meetings).
- Do not back down from the touchy issues in the feedback
- Continue active listening
- When the expression has “slowed down”, review the vision, goals, objectives , and agreements
- Continue listening
- Cycle back and repeat some of the above suggestions
- Ask for continued or demonstrated support

# Alignment Phase

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*Alignment*

## Consultant as Co-Navigator



# *Beyond Support...to Strategic Positioning*

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- Know the business.
- Identify performance gaps or issues before managers do.
- Recognize systemic relationships.
- Build strong skills as a coach, teacher, advisor, and strategist.
- Avoid pitfalls and barriers; learn detours.
- Pay attention to the trends; talk about them.
- Develop the ability to work at all levels of the organization and across boundaries.
- Know the financial picture, participate in business meetings, and ask questions.
- Be an educator about change, systems thinking, learning strategies, chaos and complexity.
- Develop personal mastery and be a constant learner.

# Strategic Positioning

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*How can you move beyond support to strategic positioning?*

# To Achieve Success

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## Internals must:

- Circumvent Client Roadblocks by Learning to
  - Handle Difficult Personalities
  - Manage Agreements
  - Lead Transitions When Leadership Changes
  - Plan for Resistance



# To Achieve Success

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## Internals must:

- Overcome Self-Imposed Roadblocks
  - Anxiety and Self-Doubt
  - Deal with Authority
  - Say No
  - Juggle Client Needs & Workload



# To Achieve Success

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## DEVELOP YOUR BEST SELF

- Work of Internal Consultant is in building relationships
- Stewardship Role
- Personal Mastery
  - Purpose
  - Competence
  - Continuous Self-Development
  - Values
  - Energetic Integrity



# Partnerships

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## QUESTIONS FOR DISCUSSION

1. *Think of a time when a partnership with an internal/external practitioner worked beautifully. What happened? What were the conditions that helped to create the successful partnership? What were the specific productive behaviors engaged in by each party? If things got off track, what happened to get back on track? Who did what? What were the qualities or characteristics of this successful partnership?*



# Partnerships

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## QUESTIONS FOR DISCUSSION

2. *Now think of a time when things went wrong. What happened? How and when did the relationship go wrong? What actions might have been taken to save it - but weren't? Or if corrective actions were taken, what were the results? What did you learn from this experience?*
3. *If you could request three behaviors or commitments from your internal (external) counterpart, what would they be?*
4. *If you were willing to make three promises or commitments to your external (internal) counterpart, what would they be?*



# Requirements for Partnerships: External

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- Remember who your client is.
- Deliver on your promises.
- Value the Internal's deep knowledge of the organization.
- Become clear about and respect personal boundaries.
- Stay apolitical and maintain objectivity.
- Maintain the highest of ethical standards.
- Leave the organization better off when you depart than when you entered.



# Requirements for Partnerships: External

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- Transfer skills/knowledge to internals and the client system.
- Bring the organization the benefits of your knowledge of the wider world.
- Recognize the value of the Internal as an ally
- Be clear (in front of Deliver on your promises
- Respect the internal's authority, expertise and role
- Communicate honestly and frequently



# Requirements for Partnerships: Internal

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- Go after partnership with externals.
- Ensure that management understands the value and expertise of internal consulting.
- Don't be offended, don't whine about not being included, and don't act out resentment in petty ways.
- Recognize that the external consultants become stakeholders in the organization and that they are under the gun to perform also.
- Help clients understand that they need to play ball and join in the change process.



# Requirements for Partnerships: Internal

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- Be clear about your role and competencies before confronting the challenges of large-scale change, planned and managed by an external firm.
- Consider using small firms that specialize in partnership with internal consultants.
- Be politically neutral or politically savvy
- Learn everything you can from externals



# *Competencies for Survival Inside*

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- Timely, Imaginative and Resourceful
- Assertive and Action-Oriented
- Organizational Savvy
- Credibility
- Collaborative
- Understands the Business
- Maintains Independence
- Manages Niche

# *Strategies to Work With Strategic, Operational and Service Organization Sectors*

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- *Given what you have learned today, how can you work more efficiently in your organization or with your organization clients?*
- *What is your strategy to implement those ideas?*
- *What support will you need?*

# *Ideas I Want to Implement*

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