

# ODN Conference

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## *Transitions and Partnerships*

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# *Transitions and Partnerships*

## **PURPOSE**

- ❖ Challenge the assumption that OD consulting is similar for internal and external roles
- by
- ❖ Focusing on two areas which impact the decisions and behavior of practitioners:
  - The transition from one role to the other
  - The partnership of working with clients

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## **OUTCOMES**

- ❖ Identify the strengths and advantages that each role offers
- ❖ Identify critical success factors to achieve a smooth transition when moving to an internal or external consulting position
- ❖ Build the requirements for productive partnership between internal and external consultants working jointly with clients

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## **AGENDA**

- ❖ Introductions and Opening
- ❖ Internal/External Reflections: Transitioning Roles
- ❖ Report Out and Discussion
- ❖ Making the Transition: Helpful Hints
- ❖ Internal/External Reflections: Partnerships
- ❖ Report Out and Discussion
- ❖ Partnership: Helpful Hints
- ❖ Wrap-up and closing

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## Moving from Internal to External

### **CHALLENGES**

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

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## Moving from External to Internal

### **CHALLENGES**

- ❖ 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

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## Moving from Internal to External

### **CRITICAL SUCCESS FACTORS**

1. Leave your former employer on very good terms.
2. Three elements to running a consulting firm:
  - a. good consulting skills;
  - b. good skills in OD;
  - c. able to run a small business
3. Affiliating with a large consulting firm.
4. Refer liberally to others.
5. Know your required financial and security needs.
6. Identify and clarify what you are really good at; learn to communicate it quickly and easily.

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Moving from External to Internal

## **CRITICAL SUCCESS FACTORS**

1. Don't be naive about how difficult it is to get things done internally.
2. Develop client agreements which support effective OD work. Don't play into the corporate dynamics.
3. Be clear about who your champion is.
4. Recognize there will be a change in the power dynamics.
5. Know the culture you're going into.

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Moving from External to Internal

## **CRITICAL SUCCESS FACTORS**

6. The risks are higher as an internal.
7. It takes more courage to consult as an internal.
8. Remember that as an internal you are developing business all the time.

# Transitions and Partnerships

## Comparison of Internal and External Consulting Roles

Similarities	Differences	
	Internal	External
Knowledge of human systems, organization and individual behavior	Accepted as a member of the “group”, congruent with culture	Sees culture, organization with outsider perspective
Understanding the process of change	Has credibility as an insider	Has credibility as an outsider
Desire to be successful and recognized for the value they bring to client	Knows organization and business intimately	Brings broader experience from other organizations
Commitment to learning	Can build long term relationships; establish rapport more easily	Can confront, give feedback, take risks with senior management more easily
Passion about their work	Coordination and integration of project into ongoing activities	Focused involvement on a project which ends
Ability to influence and lead	Opportunities to influence, gain access, sit at the table as an insider	Once invited in as outsider, broader experience offers credibility, power and influence

# Transitions and Partnerships

## Comparison of Internal and External Consulting Roles

Similarities	Differences	
	Internal	External
Skills to analyze needs and design interventions	Leverages and utilizes informal and formal organization structure	Can avoid or ignore the organization structure, move around organization to achieve results
Credibility or “Authority”	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

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## Moving from External to Internal

### **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?

# *Transitions and Partnerships*

## Moving from External to Internal

### **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?

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## Requirements for Productive Partnerships

### FOR EXTERNALS

- ❖ Remember who your client is.
- ❖ Deliver on your promises.
- ❖ Value your client's deep knowledge of the organization.
- ❖ Become clear about and respect personal boundaries.
- ❖ Stay apolitical and maintain objectivity.

# *Transitions and Partnerships*

## Requirements for Productive Partnerships

### **FOR EXTERNALS**

- ❖ Maintain the highest of ethical standards.
- ❖ Leave the organization better off when you depart than when you entered.
- ❖ Transfer skills/knowledge to internals and the client system.
- ❖ Bring the organization the benefits of your knowledge of the wider world.

# *Transitions and Partnerships*

## Requirements for Productive Partnerships

### **FOR INTERNALS**

- ❖ 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.

# *Transitions and Partnerships*

## Requirements for Productive Partnerships

### **FOR INTERNALS**

- ❖ Help clients understand that they need to play ball and join in the change process.
- ❖ 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.

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## Requirements for Productive Partnerships

### **FOR INTERNALS**

- ❖ When managing an external firm, some suggestions are:
  - ❑ Define expectations for the external and internal partners in the project.
  - ❑ Discuss and determine how conflicts and differences will be resolved.
  - ❑ Manage the scope of the project very carefully.
  - ❑ Plan frequent communication; build in scheduled checkpoints.

# *Transitions and Partnerships*

## **Conditions that Undermine Partnership**

- ❖ Internals feeling resentful, threatened and marginalized.
- ❖ Externals seen as arrogant, exclusive, judgmental; internals perceived as ineffective, incompetent, and “poor losers”.
- ❖ Externals ignore or go around the internal function.
- ❖ Weak internal functions incapable of successfully leading change projects.

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## **Conditions that Undermine Partnership**

- ❖ Organizational influence of internal consultant.
- ❖ Senior management failure to support a partnership.