Flawless Consulting Concepts & Skills

eLearning,
Curriculum Development &
Coordination / Analysis Team

Flawless Consulting Concepts

Workshop Goals & Objectives

Management vs. Staff Roles

Flawless Consulting Engagement Model

Phase 1: Entry / Contracting

Phase 2: Discovery

Phase 3: Feedback / Decision Making

Entry / Contracting Practice Activity

Wrap Up

Workshop Goals

- Goals for the workshop include:
  - Understand the value of Flawless Consulting by interacting with an experienced Premera consultant
  - Expand the notion of the "Staff Associate" role
  - Learn FC tools (Models & processes)
  - Identify when to use Flawless Consulting concepts
  - Practice how to use Flawless Consulting concepts

Workshop Objectives

- ## Objectives
  - ❑ Define characteristics of Management vs. Staff Associate roles
  - ❑ Discuss and practice the Flawless Consulting Engagement model
  - ❑ Analyze scenarios for missed opportunities to use Flawless Consulting
  - ❑ Apply Flawless Consulting concepts to daily challenges identified by our team
  - ❑ Evaluate your current Flawless Consulting skills

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Mgmt. vs. Staff Associate Roles

- ## Characteristics of each role differ:
  - ### Management role:
    - Responsible to implement department strategies / goals
    - **Has direct control** over his/her team of Staff associates
  - ### Staff associate role:
    - Accountable to get the work done (on time with quality)
    - **Has no direct control** over other associates
    - Staff Role = Internal Consultant Role
    - Pair of Hands, Collaborator, Expert

Staff Role Reality: To be a "Staff associate" is to try to influence people over whom you have no direct control.

Possible Staff Associate Roles

- **Pair of Hands**
  - Client provides "what, why, how, when, and where" and retains project control and accountability throughout implementation
  - Staff Associate implements the tasks as assigned, according to the Client's project and problem analysis
- **Collaborator**
  - Client and Staff Associate collaborate to complete the problem analysis regarding "what, why, how, when, and where" – the collaboration continues throughout implementation
  - Client retains control and accountability and Staff Associate provides expertise, but both contribute to how the project is managed and implemented
- **Expert**
  - Staff Associate provides "what, why, how, when, and where" and retains accountability throughout implementation
  - Client is provided status and does retain control, but essentially abdicates accountability to deliver a successful project to the Staff Associate

Pair of Hands

- **You're acting as a "Pair of Hands" if:**
  - Client makes all decisions on how to proceed
  - Client selects methods for data collection and analysis
  - Control rests with the Client
  - Collaboration is not necessary nor sought
  - Two-way communication is limited
  - Client judges and evaluates closely / frequently
  - You deliver technical expertise only

- **Potential risks to you as the Staff Consultant or to the project:**
  - If the Client analyzes, manages and communicates well regarding the project, it can be successful. If they don't, then wasted effort and rework may occur
  - Feelings of being undervalued
  - Repetitive work that lacks challenge or reward
  - Little opportunity for growth outside of the Staff Consultant's technical realm of expertise

Collaborator

- **You're acting as a "Collaborator" if:**
  - Client and Staff Consultant work to become interdependent
  - Decision making is bilateral
  - Data collection and analysis are joint efforts
  - Control issues become matters for discussion and negotiation
  - Collaboration is considered essential and communication is two-way
  - Implementation responsibilities are determined by discussion and agreement
  - Consultant's goal is to solve problems so they stay solved

- **Potential risks to you as the Staff Consultant or to the project:**
  - Client may see attempts at collaboration as indifference or "foot dragging" or "time wasting"
  - Clients who prefer to be surrounded by "Pairs of Hands" may consider attempts to collaborate as a form of insubordination

Expert

- **You're acting as a "Expert" if:**
  - Client elects to play an inactive role
  - Decisions on how to proceed are made by the Staff Consultant, on the basis of his / her expert judgment
  - Problem analysis is completed by the Staff Consultant
  - Technical control rests with the Staff Consultant
  - Collaboration is not required and two-way communications are limited
  - Staff Consultant plans and implements main milestones
  - Consultant's goal is to solve the immediate problem

- **Potential risks to you as the Staff Consultant or to the project:**
  - Without the involvement of the Client, Staff Consultants may not have access to "people and processes," making project success more difficult
  - You are more exposed, because if "it's your project" and it does not succeed, your reputation for being effective may be tarnished

Mgmt. vs. Staff Associate Roles

- **Thriving in a Staff Associate role**
  - The key is managing lateral relationships well
  - Three general sets of skills are required
    - Technical Skills
    - Interpersonal Skills
    - Consulting Skills

Staff Consultant Role Challenge: *How to get your expertise used when you don't have direct control.*

Mgmt. vs. Staff Associate Roles

- Staff Associates rely on three general sets of skills
  - **Technical Skills** – Time management, instructional design, eLearning, analytics, project management, industry knowledge, Facets knowledge, Excel proficiency, etc.
  - **Interpersonal Skills** – Putting ideas into words, listening, giving support, being diplomatic, providing feedback, adjusting to personality styles, etc.
  - **Consulting Skills** – Skills presented in this course that are used in different phases of the Flawless Consulting Engagement Model

Mgmt. vs. Staff Associate Roles

- ## Summary of Staff Associate Role

  - A person in a position to have some influence over an individual, group or organization *but who has been granted no direct power to make changes or implement programs*

  - Most Staff Associate roles in organizations could be described as internal consultant roles, even if they don't officially call themselves "internal consultants"

  - Staff Associates function in any organization by planning, recommending, assisting or advising

Flawless Consulting Concepts

- Workshop Goals & Objectives

- Management vs. Staff Associate Roles

- **Flawless Consulting Engagement Model**

- Phase 1: Entry / Contracting

- Phase 2: Discovery

- Phase 3: Feedback / Decision Making

- Entry / Contracting Practice Activity
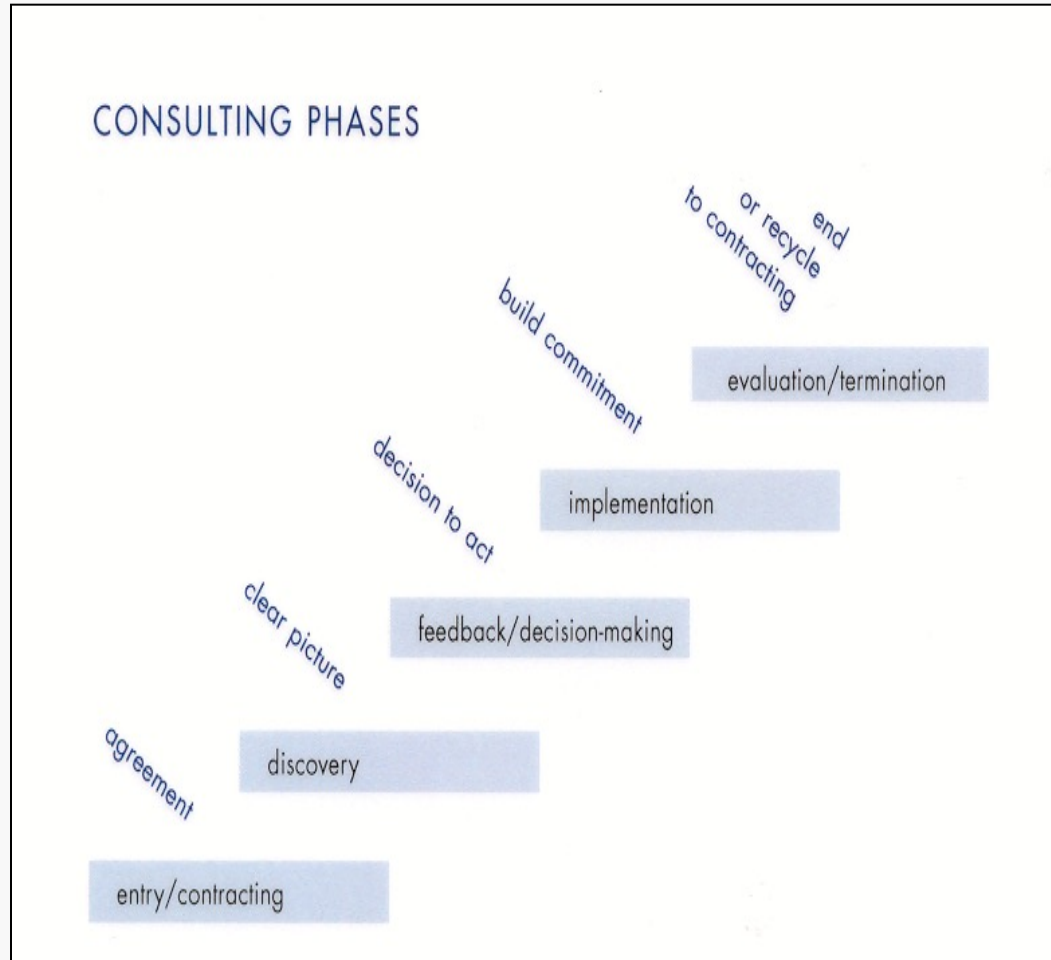
- Wrap Up

What is Flawless Consulting?

- ## A Model
  - ❑ Flawless Consulting is a communications model created by Peter Block to assist Staff Associates in having their expertise used

- ## A Mindset
  - ❑ A frame of mind or an approach to day to day work that empowers Staff Associates to use their expertise, contribute more broadly, have greater impact and provide greater value to their teams, projects and organization

Why Flawless Consulting?

- To provide support and services to our Clients with a methodology and approach that:
    - Ensures having your expertise fully utilized
    - Establishes / maintains Client partnerships
    - Avoids the "no-win" consulting situations
    - Develops Client commitment (*ownership*)
    - Increases your leverage (*potential influence*) with the Client
    - Ensures having your recommendations implemented more frequently

FC Engagement Model

CONSULTING PHASES

entry/contracting

agreement

discovery

clear picture

feedback/decision-making

decision to act

implementation

build commitment

evaluation/termination

or recycle to contracting

end

- **Entry / Contracting**
- **Discovery**
- **Feedback / Decision Making**
- **Implementation***
- **Eval / Termination***

* Not covered in today's workshop

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Entry / Contracting

- **Every issue dealt with in contracting means fewer problems later on - this is your highest leverage time**
  - ❑ Eliciting Client expectations of you
  - ❑ Negotiate wants
  - ❑ Cope with mixed motivation
  - ❑ Deal with concerns about exposure and loss of control
  - ❑ Being assertive (not aggressive or non-assertive)
 - ❑ Sell yourself as a "collaborator"
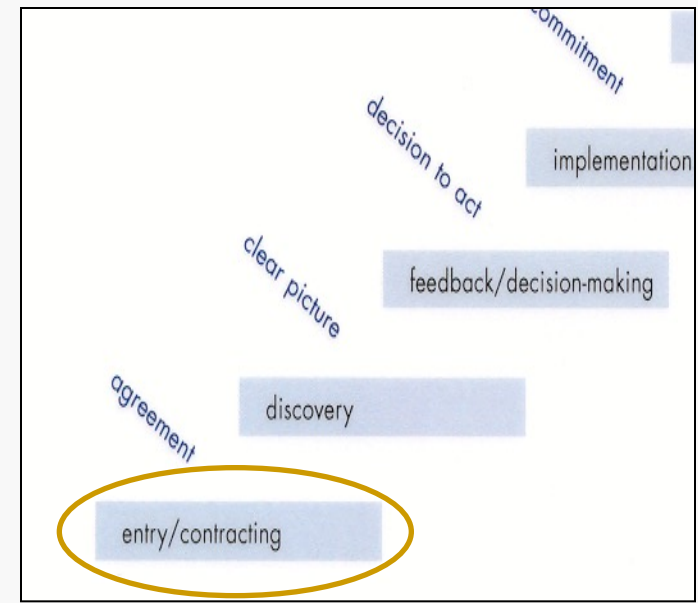
Goal: **Agreement**
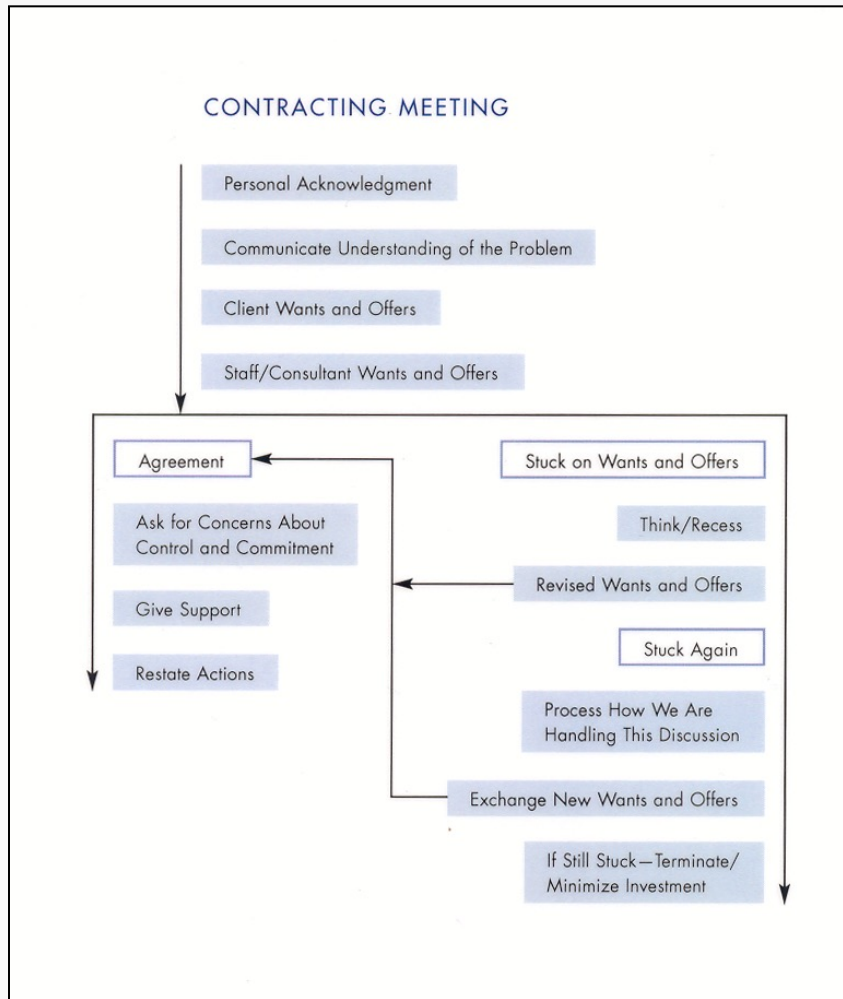
Entry / Contracting

- Most consulting failures are failures of the Entry / Contracting phase. Challenges include:
  - The Client wants to feel that "something is being done"
  - Feeling obligated to the Client
  - Either you (or the Client) is taking on a project for the wrong reasons
  - Your supervisor has heroic expectations of you
  - Feeling that our way is the only right way
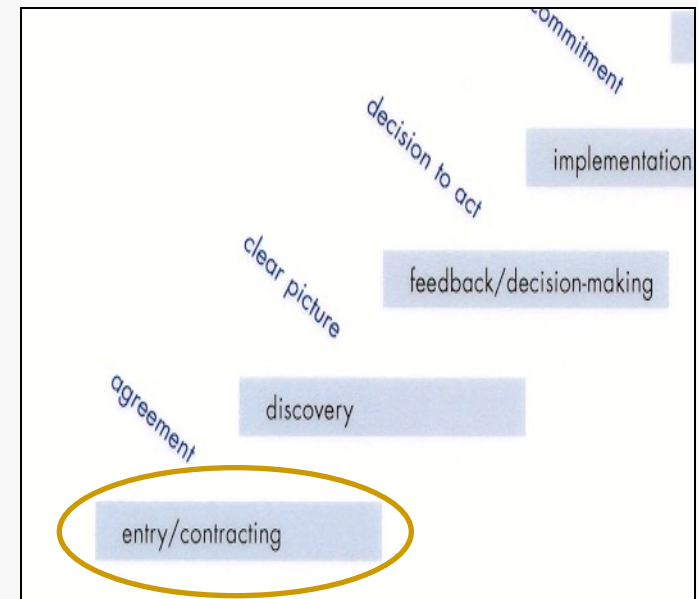
*Goal: **Agreement***

Hurried contracting, shotgun diagnosis and impersonal feedback are the breeding ground for problems in implementation.

Entry / Contracting Methodology

CONTRACTING MEETING

Personal Acknowledgment

Communicate Understanding of the Problem

Client Wants and Offers

Staff/Consultant Wants and Offers

Agreement ← Stuck on Wants and Offers

Ask for Concerns About Control and Commitment

Think/Recess

Give Support

Revised Wants and Offers

Stuck Again

Restate Actions

Process How We Are Handling This Discussion

Exchange New Wants and Offers

If Still Stuck—Terminate/ Minimize Investment

- **Key Contracting Events**
  - Stating Wants / Offers
  - Asking for concerns about control and commitment (If / when you come to an agreement)
  - Processing how the discussion is going (if you get stuck)
  - How to terminate the consulting relationship or minimize investment

Goal: *Agreement*

Entry / Contracting Methodology

- **Key Contracting Outcomes**
    - Know the presenting problem
    - Understanding what the Client wants from you
    - Clients understanding of your wants
    - An awareness of how you're being managed (first insight into how the problem is being managed)

Goal / Outcome: Agreement on how to proceed by dealing with the operational and emotional issues surrounding the project

Flawless Consulting Concepts

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- **Phase 2: Discovery**
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Discovery

- The presenting of stated problems and the underlying problem are rarely the same!
  - Uncover layers of contribution
  - Find out how the problem is managed (how you are being "managed" in your consulting conversation can be a clue)
  - Resist the urge for complete data
 - See the interview as an intervention
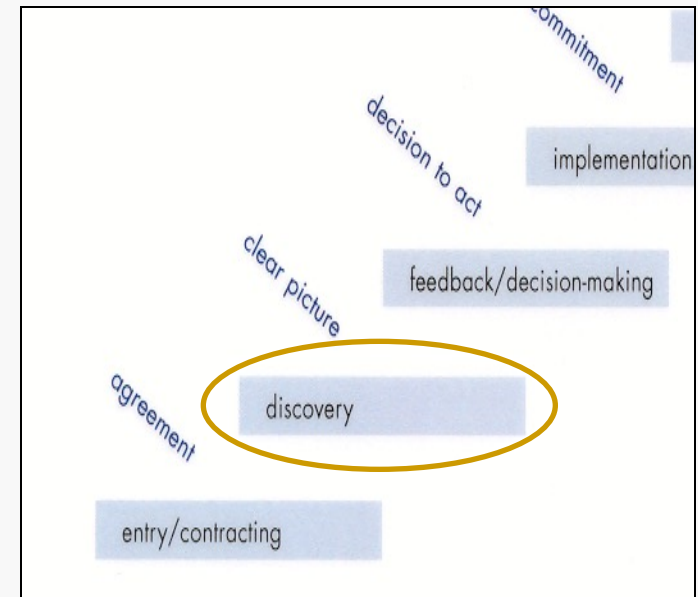
*Goal: **Clarity***
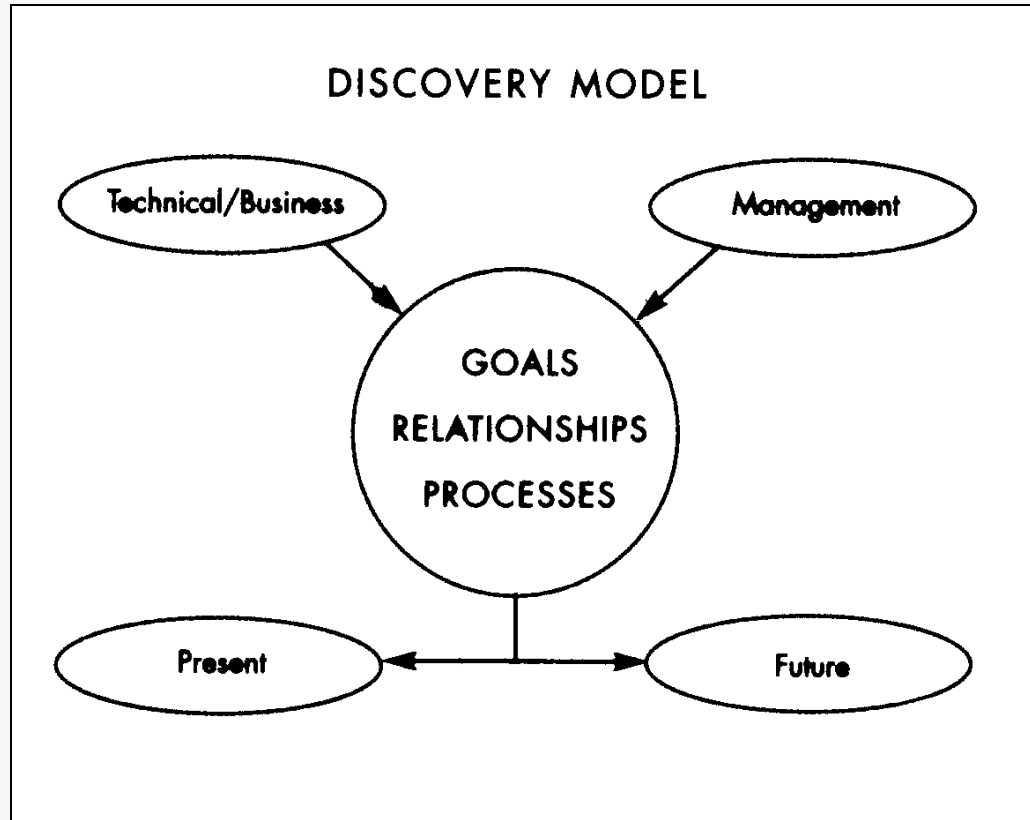
Discovery

- **Challenges of the Discovery Phase include:**
  - Clients aren't forthcoming about their investment in their own situation
  - Navigating resistance to engage in discovery, especially when they "already know" how to solve their problem
  - Uncovering whether *the way* your Client manages the problem contributes to the problem,
  - Developing an independent picture that's simple and clear
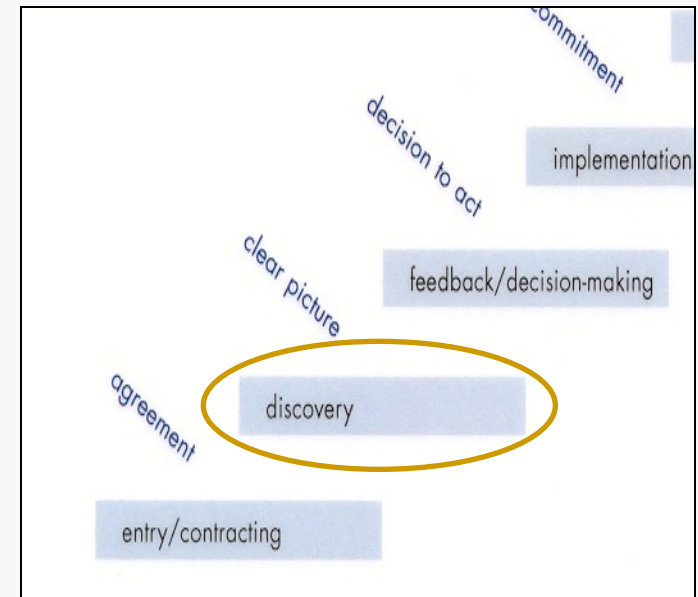
*Goal: **Clarity***

"Don't shoot. We may both be on the same side." – Ashleigh Brilliant

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Discovery Methodology

DISCOVERY MODEL

Technical/Business → GOALS RELATIONSHIPS PROCESSES ← Management

Present ↔ Future

Goal: *Clarity*

- **Key Discovery Events**
  - Spending time on how the problem is being managed now
  - Identifying the "present / future" gap, and what's causing it
  - Identifying layers of the problem (presenting problem, others' contribution, Client's contribution)

Discovery Methodology

- **Key Discovery Outcomes**
  - Understand the layers of the problem
  - Establish trust
  - Organize your data
    - Identify themes
    - Choose messages
    - Develop statements
    - Develop recommendations

Goal / Outcome: *Discovering the underlying dimensions of the problem*

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Feedback / Decision Making

- The basic business of the feedback and decision-making phase is getting the Client to act on the underlying issues.

  - Get Client to take responsibility
  - Present personal / organizational data
  - Identify and work with different forms of resistance
  - Support the Client
  - Revisit your Entry / Contracting agreement (if necessary)
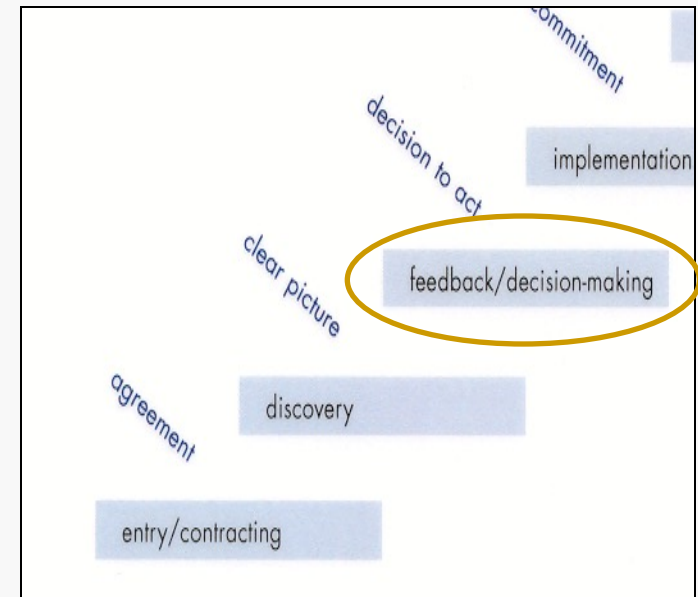
*Goal: **Decision***

Feedback / Decision Making

- **Challenges of the feedback and decision-making phase include:**
  - *Suggesting solutions other than what the Client already "envisions"*
  - *Identify and work with different forms of resistance*
  - *Get Client to take responsibility*
  - *Prepare to assume a role of Pair of Hands, Collaborator or Expert, then confirm that role with the Client to make sure they agree*
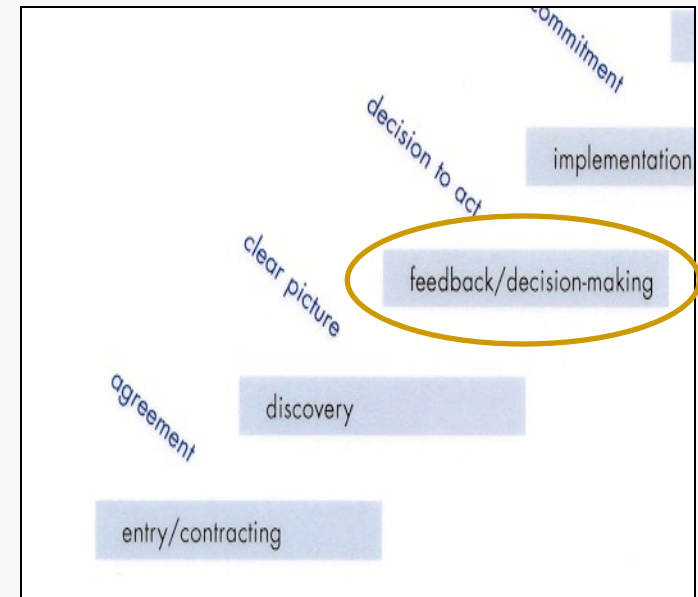
*Goal: **Decision***

Until your message(s) and recommendation(s) are accepted, suggestions for change are premature.

Feedback / Decision Methodology

FEEDBACK MEETING

Restate the Original Contract and Agenda for this Meeting	5%
Present Diagnosis (and Recommendations)	15%
Ask Client for Reaction to Data (and Recommendations)	30%
Halfway through: Ask Client if The Meeting is Useful	10%
Get a Decision to Proceed	30%
Test for Client Concerns about Control and Commitment Ask Yourself if You Got What You Wanted Give Support	10%
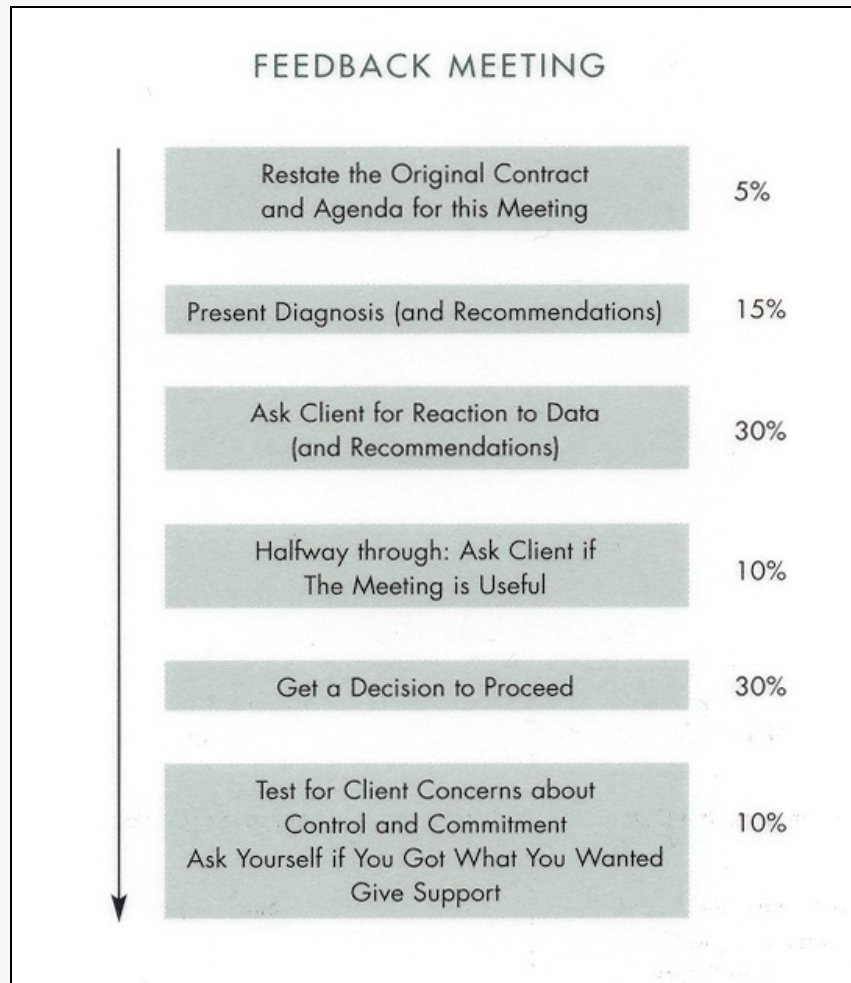
- **Key Feedback / Decision Making Events**
  - Restate original contract
  - Present diagnosis and recommendations
  - Get Client's reaction to data & recommendations
  - Get a decision to proceed, or identify Client concerns

Goal: *Decision*

Feedback / Decision Methodology

- **Key Feedback / Decision Making Outcomes**
    - Get a decision to proceed, or identify Client concerns
    - Get the client to maintain accountability / responsibility
    - Generate a clear understanding (on the Staff Associate's part) of which role they will play:
        - *Pair of Hands*
        - *Collaborator*
        - *Expert*
    - If you do not achieve a decision to proceed or the level of client accountability you think is necessary, be prepared to cycle back through earlier Flawless Consulting Phases again until you do.

Goal / Outcome: Getting the Client to act on underlying issues

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Application: Role Play

- Partner Activity: Off-Site Planning Project
  - Instructions
    - Pair up with another workshop participant
    - Choose who plays the "Client" role and who plays the "Consultant" role
    - Read your role within the scenario provided
    - Go with a facilitator (all Clients with Laurie, all Consultants with Roderick) to discuss role in more depth
    - Reconvene to run role play
    - Group debrief

Application: More Activities

- ## Small Group Activity: Seattle Coffee Co.
  - Review instructions provided with activity

- ## Small Group Activity: Challenges @ Work
  - Review instructions provided with activity

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- Entry / Contracting Activity

- **Wrap Up**

- Envision your Staff Associate role as more of an "Internal Consultant" role
- Use the three stages of the FC Engagement Model
  - Entry / Contracting
  - Discovery
  - Feedback / Decision Making
- When and How to use FC Tools
- Evaluating your current Flawless Consulting skills

Question & Answer

- Q&A session

- Were your "Wants" met?

- Post-workshop evaluations

Additional Resources

- ## Flawless Consulting Resources

  - ### Read Flawless Consulting – (2nd Ed.)
    - The definition of consulting, (Pg. 2)
    - The five phases of consulting & what happens in each phase, (Pg. 6-7)
    - The goals of consulting, (Pg. 18-21),
    - The roles consultants choose (Pg. 21-28)
    - The two questions to ask yourself whenever you are with a Client, (Pg. 37)
    - The basic business and requirements of contracting, (Pg. 41-42)
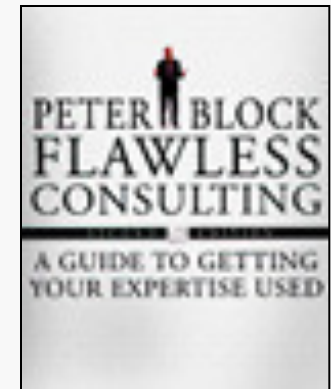
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