

**CHAPTER 9**

**THE BUILDING AND PRODUCING  
PROCESS**

## **The Practice of Professional Consulting**

This chapter explains the third stage in the consulting cycle, the process of building and producing deliverables. The purpose of this stage is to make sure that project teams complete agreed-upon solutions according to the project plan. This stage requires a lot of people skills in project leaders who must balance their natural technical expertise with the political expectations of clients and the motivational demands of their consulting teams. In this chapter, we will examine the challenges of performance management, motivation, status review meetings, data gathering, and organization politics.

The Building and Producing stage is an important process that should be studied carefully. It is the stage when time and budgets become most sensitive to waste and when clients can become delighted with progress, or become really disappointed, even upset, with their consultants. For example, in one consulting engagement the IT department of a major insurance services company hired a major, international IT consulting firm to produce a global broking system. The consulting firm embedded its own consulting experts in the company and appeared to slow the devolvement process down to a crawl. Interim deliverables and early versions of the system were not satisfactory. Several years and hundreds of millions of dollars later, a dismayed and angry client still awaited the solution. Expectations were mismanaged and project team motivation suffered until the client took eventually took back control of the project and produced the solution themselves. Needless to say, the consulting firm lost a great deal of credibility and trust with client. Its long-term reputation was certainly damaged.

Clients often complain about mismanaged project plans, delays in deliverables, cost overruns, and mismanaged expectations. These are some of the reasons why consultants are not held in very high esteem in many corporations. In addition to those problems, other challenges include organizational politics, managing the productivity of the team as well as coaching the performance of individual consultants.

With so many risks and vulnerabilities during this stage, the project manager must be able to exercise exceptionally good leadership and each consultant must work hard to ensure that the stage is extremely well executed. In this chapter, we will explain the tools and techniques to achieve those results.

### **CONSULTING LEADERSHIP – PRODUCING RESULTS**

The central leadership challenge for consultants during this stage of the cycle is producing results. In order to produce results, all consultants, and especially those who manage other consultants, must be skilled in managing people's performance, motivation, measuring progress, coaching people, using good political skills, leading meetings effectively, using methods and administrative procedures properly, and paying close attention to existing, emerging and new client expectations. We begin by examining the challenge of managing performance.

### **PERFORMANCE MANAGEMENT**

By *performance management* we mean a process by which the results produced by each consultant and the entire consulting team, are accomplished as set forth in the project plan, while allowing for creativity and surprises. The performance management process consists of: 1) goal setting; 2) tracking performance; 3)

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coaching; and 4) appraisals. This process enables the project leader to be systematic and logical in managing people, hold consultants accountable for results, and at the same time, allow for initiative and creativity.

As implied by the name, performance is something we assume *can* be managed. This requires that project leaders implement the four steps of the performance management process, beginning with goal setting. Goals are important for at least three reasons. First, they are basic to human motivation. Each of us lives to achieve goals of one sort or another. In consulting projects, goals provide a motivation to produce results.

Secondly, with a set of project-related performance goals in place, project leaders can use them to assess each consultant's future performance against the accomplishment of those project goals. Thirdly, non-project goals ensure that broader professional development of employees and the firm are achieved. For a firm to grow all consultants must acquire new skills, insights and knowledge, and they must be contributing the firm's financial health.

Each consultant ought to have a small number of manageable goals (four to six) and each goal should be detailed and specific as well as practical and achievable. Consulting goals can vary quite a bit, but usually cover such categories as:

GOALS	
1. Project plan related	Roles, tasks, specific deliverables
2. Personal, professional training	Knowledge, skills and abilities
3. Consulting practice development	New procedures or processes
4. Application rate	Billable / chargeability time
5. Sales and revenue	Money or percentage terms
6. Client development	Adding clients /account penetration

A practical way for consultants to write goals to ensure they are clear is by using the classic SMART method. This acronym is a simple, well-recognized method used by business managers and is easily adaptable to the consulting environment.

**S.M.A.R.T. Goals.** The acronym stands for *Specific, Measurable, Achievable, Realistic* and *Time Bound*. Each component has specific requirements and collectively they serve to set very good performance goals against which results can be tracked, coached and appraised.

**“Specific.”** By specific, we mean the goal must be described as a concrete outcome or result. A mistake is often made by describing a goal as a set of activities; these are *inputs* to producing an outcome, not the goal itself. For example, if an IT consultant had to produce a report that recommends to a client the selection of certain application software, a *specific* goal would be stated as: “Deliver a software recommendation to “X” client.” In strategy consulting it might be: “Recommend a marketing strategy for the sole proprietor insurance business.”

**“Measurable.”** This means there is a metric attached to the goal that enables a consultant to know the level of accomplishment required. In our examples, it simply means that *one* report is to be delivered.

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Once the report is written and delivered we know the goal has been accomplished. Or, in the second example we might state it as *three* alternatives strategies for the Chicago market.

**“Achievable.”** This means the goal can be done given the skills, expertise, timeframe, and logistics needed to perform the work by the consultants. It is usually a good practice to set a goal with some stretch in it to ensure that consultants have the opportunity to grow their professional capabilities and improve their performance, wherever possible. In our example that might mean adding that the work will be done across two departments in the firm – *applications development and sales*; or limiting the strategic alternatives to the top one hundred firms by sales revenue, to limit the scope of the study to an achievable amount.

**“Realistic.”** This means that the goal needs to be in the context of the consultant’s work, the firm’s mission and strategy, and the client’s needs. It also means that the time-frame and the scope (of the report) is something practical and achievable. All of this must add up to a conclusion that the goal is realistic, given the context, demands, and expectations of the consulting work.

**“Time Bound.”** This means the goal has a specific time when it must be accomplished. In our example, this means that the report is delivered to the client on *October 18, 2010*. The date must coincide with existing project plans and the client’s expectations.

By structuring our thinking with the aforementioned criteria, we have a complete “SMART” goal:

*Deliver a sales applications software recommendation report to client (X) by 10/18/10. Or: Deliver three marketing strategies for the sole proprietor insurance product for the top one hundred firms in the Chicago market, by October 18, 2009.*

It may seem a bit cumbersome having to make each consultant write a set of SMART goals. However, not only will the goals be sharper, but the thinking that goes into making them SMART compliant improves. As a result, with practice it becomes easier to write goals in this fashion and it makes the rest of the performance management process that much easier, not only tracking performance but also the coaching responsibility.

## **PERFORMANCE COACHING**

Coaching is the art of helping someone to learn a new skill, gain new knowledge or acquire a new ability. Every professional can benefit from coaching. Coaches help professionals achieve their highest level of performance and once at that level, the coaching helps them *stay* there! As even the world’s best tennis player or golfer requires coaching, so consultants need to be coached as well.

In today’s corporate environment, management coaching is a skill widely used by leaders in their professional practice. In addition, coaching is a *consulting service* provided to business managers by external

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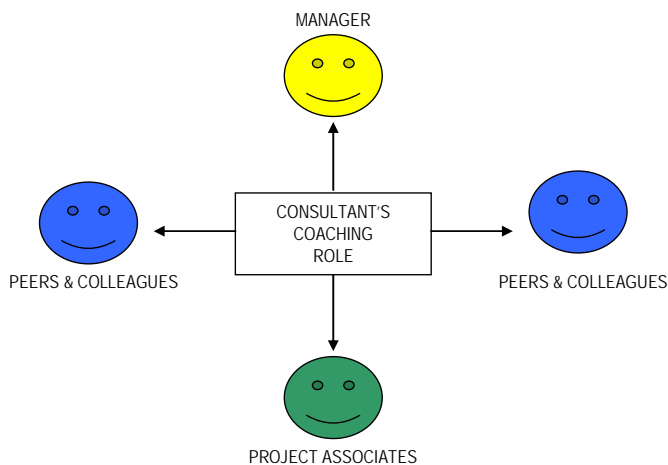
consultants who specialize in this form of consulting to improve individual manager's personal performance. This so-called "*executive coaching*" helps managers to improve in areas such as:

1. Dealing with an employee's leadership style.
2. Overcoming interpersonal problems.
3. Assisting in specific skill building.
4. Creating individual development plans.
5. Providing career transition help.
6. Supporting employees acquired through a merger.
7. Complementing employee assistance programs.

Coaching is not limited to people we normally associate with the role, such as in sports, and coaching is something anyone can learn. It is a best practice for business managers as well as consultants. In the consulting world, consultants who manage others in some capacity can use coaching to improve people's performance as well as move a group through the stages of team building.

Additionally, coaching is more than what project leaders do only with project team members (i.e., direct reports). Consultants can also coach each other. Consultants can pass on their specialized knowledge and skill to clients. Sometimes a consultant's same-level colleagues need help; sometimes even senior, managing consultants may need to improve or learn about something. As Figure 9.1 shows, coaching is a skill that can be used with people on a 360-degree basis. Coaching can be used successfully with anyone and at any time, when someone needs to learn something new to help them improve performance.

**Figure 9.1 360-Degree Coaching**



**Positive Coaching.** Positive coaching is a best practice and skill that can be used to enhance, improve, develop, and increase anyone's abilities, whether or not a mistake has been made. An important point is that coaching is not only used by lead consultants or project managers in situations with subordinates when they have done something wrong or made mistakes. For example, when coaching a tennis player the coach does not just point out

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what the player did wrong, but rather may place the focus on a change in tactics or physically moving differently simply to get the player above current standards. In this sense, positive coaching simply raises the “skill and performance bar.” In the consulting business, project leaders can coach in the same manner and with the same intent. Thus, we have one consultant helping to redirect other consultants to achieve the goals of their respective roles, or helping the team improve within the context of the project plan. This is positive coaching.

**Corrective Coaching.** Lead consultants can use coaching to correct a team member’s performance. Corrective coaching is certainly a good practice and necessary when mistakes are made. Whether handling mistakes or pushing for higher standards of performance through positive coaching, consultants can use “coaching moments” to effectively make changes – i.e., to help others not to make the same error twice. Learning how to be an effective coach is easier if there are a set of coaching competencies to be learnt, if there is an organizing framework to be followed, or a coaching model that explains how coaching works.

**Coaching Models.** In most training programs and books on effective coaching the practice of coaching is boiled down to a logical and rational decision making process: Identify the problem, generate alternative solutions, evaluate each solution, choose a solution, and implement the solution. This is what consultants and managing consultants do naturally to solve problems. However, coaching is a different process. It involves human motivations, introspection, creativity, behavioral skills, dialogue, reflection, and contextual thinking. The coaching process requires such things as:

- Enabling someone to acknowledge a problem exists
- Putting the current performance in context.
- Discussing that performance could be better.
- Searching for ways to improve the performance.
- Providing and selecting a preferred approach.
- Expecting a new and fresh approach will be taken.
- Learning from experience.
- Being persistent in expectations and results.

The characteristics, elements and dynamics of coaching can be organized into a simple, logical framework with five steps called “POISE.” This simple model can be used by consultants to structure and conduct face-to-face coaching.

**POISE Coaching.** Five steps to follow when coaching someone and an easy way to remember the steps, is using the acronym POISE. First, tell the person the *Purpose* of why you want to meet with them, i.e., to give the person some feedback. Secondly, provide specific *Observations* you have made about the person’s performance; including both positive and a negative observations. Thirdly, describe the *Impact* of the person’s performance on the work environment. Fourthly, after discussing what may be causing the current level of performance, identify alternative *Solutions*. Once a solution has been found, discussed, evaluated, and agreed upon, provide the person with *support* by: 1) reviewing how to perform in the better way; and 2) giving the person an opportunity to practice. Finally, the coach (i.e., a senior consultants, team leader, or managing consultant) provides

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*Encouragement* by communicating that in the future, the coachee is expected to perform in the new way. In the future the person must pay closer attention to *how* work is done and how results are achieved. The coaching session ends with a few simple words of thanks and support. The “POISE” coaching model is:

- P** = Purpose of the session or meeting
- O** = Observations that are specific
- I** = Impact on others, standards and oneself
- S** = Solutions and support
- E** = Expectations and encouragement

The first three steps in the POISE model focus on telling, sharing and explaining. The rest of POISE is a dialogue and discussion; asking questions, listening carefully; probing and testing assumptions; examining conclusions to make sure they are valid. A good coaching practice is the coach taking partner posture with the coachee, using a friendly communications style and a positive tone. A simple but useful question for the coach is “How can I help this person learn?”

On the other hand, raising one’s voice, rebuking and harshness (often seen in coaches handling sports teams) are not best practices and should be avoided in all professional consulting environments. Such behavior creates a negative, perhaps humiliating impact making the recipient feel ashamed, embarrassed or hurt. Obviously, this creates barriers to learning, change and improvement. A good coach does not need to use such demeaning tactics. A good coach can be serious and demanding as well as friendly and respectful.

**Coaching Tips.** It is useful to remember that the product of coaching is simply to *help people learn* new ways of thinking and behaving that change the outcomes people produce. Keep in mind the following:

- Learning is always enhanced if the coach uses a *coaching style* that treats people with respect and dignity.
- People may have different *learning styles* from that of the coach and therefore, may have different ways of understanding the problem and see different ways of solving it (see chapter 10).
- *Age* is a factor. Older adults often find it more difficult to learn something new. As people age their thinking patterns become reified and their behavioral habits strengthen; adults like routine. In other words, it becomes more and more difficult for older people to change.
- If possible, conduct the coaching in *private* since older people may be self-conscious and easily embarrassed trying to demonstrate a skill in a public environment. Adults often find it hard to admit: “I don’t know how to do that.” Push them too hard and they will resist.
- Use POISE to *plan and prepare* the content of the coaching session and use it to develop the right focus, tone and attitude toward the coachee.

In consulting, inevitably we will be working with other consultants of varying age, ethnicity, gender, race and experience. Those factors must be taken into account as the team leader or managing consultant manages the performance of team members. While POISE provides a standard process for planning and conducting coaching, the coach must be mindful of the complexities and subtleties presented by those factors. Human relations skills are extremely important when working with clients and fellow consultants around the world, and in general, the

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reader would benefit from a deeper understanding of the thinking, behavior, perceptions, and expectations of cultures other than his or her own.

**Coaching Resistance.** Resistance to change and personal improvement is natural and to some extent to be expected from knowledge workers and experts, who may find it difficult to admit they do not know or cannot do something. The reasons consultants resist being coached or resist the changes required from the coaching, is deeply psychological, a full treatment of which is beyond the scope of this book. However, anyone interested in coaching as a consulting practice ought to study the psychology more thoroughly. Block (1981) for example, explains that resistance occurs from fear, lack of control or feelings of vulnerability. Hambrick and Cannella (1989) discuss three forms of resistance: blind, political and ideological. Burke (2008) in the context of individual, group and organizational change, suggests that resistance is not as bad as apathy; that resistance is a normal human response requiring a respect for people's defense mechanisms as they deal with shifting away from known to unknowns, what is familiar and comfortable to situations that are not, and from certainty to uncertainty.

Clearly, when managing the performance of consultants through coaching, it is important to acknowledge and respect the resistance, but to seek an understanding of what lies behind initial verbal statements such as "*I can't do that*", "*I don't think that is right*", or "*I don't want to do that.*" Is the person resisting because of a lack of understanding about what to do or why something needs to be done? Does the consultant not know how to do it? Is the person embarrassed to admit a lack of knowledge about something and is secretly not sure what to do? Does the person fear repercussions of lacking expertise?

Instead of jumping to conclusions, the savvy coach knows people resist for a reason, asks questions, and takes the time to discover the root causes of those reasons. The coach listens with an open mind, creating a safe, open, positive and supportive climate for the discussion. Coaching resistance requires a combination of emotional intelligence, compassion, and a deep interest in developing people (consultants) who have been trained to provide answers and solutions, rather than share fears about vulnerabilities.

Finally, when working with consultants and for that matter, clients who are resisting, it can help to use language that causes a shift in perspective. Table 9.1 provides examples of what to say in situations where avoidance or opposition is present. A paradigm shift from "Can't Do" to "Can Do" can re-orient thinking to what is possible rather than what is not; to benefits rather than costs; and to new behavior rather than rigid attitudes. In the broader context, throughout the consulting cycle consultants must have the emotional resilience and language to challenge the status quo, in order to counter the normal and natural tendency to resist change from clients and team members alike.

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Table 9.1 Consultants' Can Do Attitude

CANNOT DO	CAN DO
We've never done it before	We have the opportunity to be first
It's too complicated	Let's look at it from a different angle
We don't have the resources	Necessity is the Mother of Invention
It will never work	We'll give it a try
There's not enough time	We'll re-evaluate some priorities
We already tried it	We learned from the experience
There's no way it'll work	We can make it work
It's a waste of time	Think of the possibilities
We'll cannibalize our sales	We'll do it before they do
We don't have the expertise	Let's network with those who do
We can't compete	We'll get a jump on the competition
Our vendors won't go for it	Let's show them the opportunities
It's good enough	There is always room for improvement
We don't have enough money	Maybe there's something we can cut
We're understaffed	"We're a lean, mean machine"
We don't have enough room	Temporary space may be an option
It will never fly	We'll never know until we try
We don't have the equipment	Maybe we can sub it out
It's not going to be any better'	We'll try it one more time
It can't be done	It'll be a challenge
No one communicates	Let's open the channels
Isn't it time to go home?	Day go so quickly around here!
I don't have any ideas	I'll come up with some alternatives
Let somebody else deal with it	I'm ready to learn something new
We're always changing direction	We're in touch with our customers
It's too radical a change	Let's take a change
It takes too long for approval	We'll walk it through the system
Our customers won't but it	We'll do better at educating them
Our company is the wrong size	We're perfect for this project
It doesn't fit us	We should look at it
It's contrary to policy	Anything's possible
It's not my job	I'll be glad to take the responsibility
I CAN'T	I CAN!

**Situational Leadership and Coaching.** Hersey, Blanchard and Johnson (2001) offer a practical way to develop consultants that focuses on their level of experience and job (or task) maturity. Hersey and Blanchard's leadership model suggests that when managing people, project leaders can be more effective by taking a "situational" approach examining the quality of team members on two dimensions needed to fulfill their roles and responsibilities, their 1) *willingness* or commitment level; and 2) *ability* or competence level.

Applying situation leadership to consulting, if the consultant-team-member is *low* on ability but *high* on willingness, the project leader's will be more effective being directive by instructing the consultant in the abilities that are weak. If the consultant has *moderate to above average* skills and is still having problems, the leader's approach should be coaching and supportive with lots of discussion to diagnose what is going on and to encourage the consultant to come up with viable solutions. When the

consultant is *highly* competent, willing and committed (i.e., a peak performer) the project leader will be most effective purely delegating work and expecting the consultant to work independently.

This model of leadership requires consulting team leaders having a range of behavior, flexibility in styles, an ability to diagnose particular situations, and an ability to accurately match styles to situational needs. To deal effectively with new, intermediate-level and mature/senior consultants, team leaders must use a different leadership style in each situation, paying close attention to each consultant's performance, and intervening to provide the right levels of direction, coaching and support, according to the consultant's level of willingness and ability to perform the various roles and tasks of the consulting process.

Situation leadership can be helpful to our practice of performance management since project team leaders do not always have luxury of getting seasoned, mature and highly qualified consultants on every project team. In fact, consulting firms need fresh, new consultants joining the firm and learning their craft? Therefore, an important part of being a project leader is training and developing younger consultants; turning them into competent and committed peak performers.

### MOTIVATING CONSULTANTS

What motivates people? What motivates you? The subject has been studied for many years and many theories of motivation have been formulated. Most prominent among the theories that relate to business and consulting are (Kreitner, 2007; Burke, 2008):

1. Behavior modification – B. F. Skinner
2. Motivation-Hygiene Theory – F. Herzberg
3. Expectancy Theory – V. Vroom
4. Need for Achievement – D. McClelland
5. Hierarch of Needs – A. Maslow

These are all psychologically-based ideas about human motivation. Each has merit and helps to explain what drives people and why they have such tendencies. However, most consultants are not psychologist and find it difficult to apply these theories to the work place. A more practical approach can be found by completing the short motivation exercise found in Table 9.2.

First check nine of the eighteen things that motivate you; identify the actions and items that you find most meaningful. Then, after identifying your personal motivators, score them on Table 9.3 by placing a check next to the item number as shown in the three columns.

**Table 9.2 Motivation Exercise**

*What motivates you and makes you feel valued?  
Please circle 9 of the following 18 types of rewards and recognition that you find most meaningful.  
Select those that are most likely to motivate you to maintain or improve your performance.*

1. My manager sends me a letter praising my performance.
2. Doing work that is challenging and interesting.
3. Receiving a good performance review.
4. Getting more vacation time for years of service.
5. Working with people you enjoy working with.
6. Being coached and getting special attention from my manager.
7. Getting "perks" such as a special parking area, use of executive facilities.
8. When I give my opinion on an important issue, I am listened to.
9. Seeing my views and ideas being put into action.
10. Receiving verbal praise from my manager.
11. Getting a special bonus because of my grade level.
12. Completing an assignment that makes a difference to the business.
13. Receiving a promotion based on my past performance.
14. Learning new things.
15. Getting a raise based on my performance.
16. Getting a special reward for doing something.
17. Being praised by others employees for doing good work.
18. Getting time off for having given "extra effort."

Now post your results on Table 9.3 the Motivator Score Sheet.

**Table 9.3 Motivator Score Sheet**

<u>Group A</u>	<u>Group B</u>	<u>Group C</u>
Item 1 ____	Item 4 ____	Item 2 ____
Item 3 ____	Item 7 ____	Item 5 ____
Item 6 ____	Item 11 ____	Item 8 ____
Item 10 ____	Item 13 ____	Item 9 ____
Item 16 ____	Item 15 ____	Item 12 ____
Item 18 ____	Item 17 ____	Item 14 ____

Are most of your "motivators" in column one, two or three on the score sheet? Results show that of the hundreds of people who have taken this quiz, *one hundred percent* have had the largest number of "motivators" in column C. The items in column C are what motives people the most at work and this includes the many consultants who have done the quiz. Your results indicate your motivation preferences.

Column A on the score sheet are items that *managers control* and may or may not be given to employees, depending on particular circumstances and aspects of employees' employment situations. Column B are items set by *policies* of a company and therefore represent items subject to standardization; employees and their colleagues may or may not receive them. They are largely out of the control of

individual managers as they must abide by company-wide standards and rules. Column C is the motivators. These have to do with: 1) working with interesting people; 2) learning by doing interesting and challenging work; and 3) being listened to and having impact at work. Throughout all industries, companies, functions, organizational levels, and roles, these are the *predominate* motivators; these are the enduring characteristics of employment that motivate employees. They are the factors that people seek in searching for new jobs, making an internal job transition, or getting promoted.

This suggests that to increase motivation, project team leaders ought to include column C items in their projects and try to align team members with their preferred roles and responsibilities. Make sure members have a voice and are heard; give people “stretch” assignments that enable them to learn and grow in their knowledge and skills, and work hard to put together teams of people with high competence and complementary skills.

Even though it is impossible to get a perfect fit, look for aspects of the work that can be made more interesting and challenging. Recognize members for having an impact on project performance; put together a team that has fun together and enjoys each other’s contributions; build the project team to bring out the features of column C; challenge the team by setting higher standards, coach people to help them learn and grow, professionally and personally. Listen -- *really listen* -- to people.

Items in the other columns are also important and can provide short-term motivation, but they are not as significant and enduring as column C factors. For example, over time, we all need more money and that drive seems never ending. But it seems clear that honorable and noble work, work where people learn, and work with great people, “trumps” money. That explains, in part, why people work in hospitals, museums, charities, and schools, where often their psychic income is far greater than their financial income.

Our view is that Column C is consistent with Herzberg’s concept of job enrichment (1968) and Hackman and Oldham’s diagnostic approach to job design (1980), including such factors as skill variety, task identity, task significance, autonomy and job feedback, are core characteristics of work designed to motivate professional knowledge-worker-consultants. By extension, Conger (1998) has found that these and other factors meet the needs of Generation X employees, born after 1985. While Schermerhorn (2005) embraces an even broader, more complex perspective on motivation, for project team leaders a practical and simple set of questions for consultants are:

- Do they find the work intellectually interesting?
- Are they working with people that help them gain new insights into their work?
- Are they able to expand their knowledge?
- Do they have chances to work on new problems?
- Can they share their knowledge and skills?
- Can they apply newly gained insights and learning?
- Can they teach, coach, and mentor others with their knowledge and skills?
- Are they able to see quickly the results of their work?

Pondering the answers to such questions, team leaders should give serious thought to how they can re-arrange work, organize assignments, create working relationships among people, expose consultants to new and interesting things, and help consultants to pursue their personal areas of interest and challenge. This, of course, can be difficult and may not be possible with every consultant on every assignment. However, if project leaders communicate a desire to do so and occasionally are able to create such opportunities, team members will know that management cares about and understands their needs. In return, our experience indicates consultants will be more likely to be cooperative, work harder, enjoy their work, and create a pleasant work climate for the team.

Motivated consultants are easier to manage. At performance review time it will be easier to focus on evaluating the work and results produced, instead of getting sidetracked by debating such things as effort, how things were done, emotional issues or personality conflicts. In the next section, we cover how to conduct progress review meetings with individuals and with the project team.

### PROGRESS REVIEW MEETINGS

Progress reviews are important moments when the consulting teams meets either with itself or with the client to assess how well it is performing against expectations and the project plan. Such status meetings focus on a range of matters during the Building and Producing stage and examine such things as lessons learned, successes, problems with individual behavior, technical issues, progress toward objectives, team work or customer concerns.

**Customer Focus.** Throughout this book, we have emphasized the need to be customer-focused in our consulting work. Progress review meetings ought to be designed to ensure that such a focus is maintained and that customer issues are the overriding focus for all assessments of the team and team member's performance. Whenever possible (and politically practical) it is a good practice to include the customer in such meetings not only to keep them up to date, but also to include them in developing solutions to problems that may be occurring. Discussions should be accurate, reliable, and clear so everyone knows exactly where things stand. Such discussions should include both positive progress and problems.

Consultants cannot avoid problems. After all, consulting is fundamentally about change and when things change with many "moving parts," there are bound to be mistakes, anxiety and confusion. Customers understand that change is difficult and look to their consultants to help them with the change management process, including providing the fullest amount of relevant communications. Maintaining a customer focus means keeping customers informed; giving them information in advance; giving them time to digest the situation, including them in searching for solutions; and generally treating them as equal partners in the Building and Producing process.

Customers must be included on issues that have to do with the client's organization, discovery of a significant consulting error, changes in solution functionality or specifications, plans for accessing the

customer's systems or data bases and budgetary matters, etc. These are a shared responsibility between the consultants and the customer. They may have sensitive political dimensions to them. When such customer matters are on the agenda, customers should be invited to attend the regularly scheduled progress review meetings.

There may be problems that are strictly internal to the team that would not include the customer. These might include routine analyses, administrative matters, documentation, and clarifying procedures. Another reason to exclude the customer would be if there were a serious breakdown or inter-personal conflict among the consulting team members, that could dramatically reduce the customer's confidence in the consulting team. Less serious but important "breakdowns" might include:

- Personality clashes
- Debates about what is best for the customer
- Disputes about scope and pricing changes
- Significant changes in deadlines or milestones
- Decisions about changing a team member

**Individual and Team Behavior.** Consultants who are very technical may believe that non-technical discussions are unimportant so that they shun, avoid, ignore and cynically perceive those issues as a waste of time. This is a mistake. For example, if a consultant fails to show up for meetings, or treats such meetings disrespectfully, or, if a consultant makes inappropriate remarks in front of the customer, then such behavioral incidents require examination and resolution. Those unprofessional behaviors are risky and must be examined and addressed. If is one or two consultants are at fault, strong off-line individual coaching is needed. However, behavior problems may also exist at the project team level (evidence suggesting the group is not an effective team!) indicating that in addition to the normal meeting agenda, team coaching may be in order.

Those kinds of issues are internal issues to the consulting team (and perhaps the consultant's firm) and solely the consultant's responsibility. They should be resolved before meeting with the customer and if possible, without bringing the customer into to the problem. Review meetings of this sort are called "internal reviews" are best conducted in the consultants' offices.

We have examined the problems and challenges of teamwork and team building in chapter eight and while project reviews meetings are also times when teamwork can be an issue, we need to describe the agenda of such meetings. The agenda for such meetings can cover a large number of issues related to people, project plans, processes and producing results.

**Agenda for Progress Review Meetings.** A standard agenda for a project status review meetings is shown in Table 9.4. The agenda is generic and covers all items that *might* be included. Certain items may not be included in some meetings and that is the decision of the project leader who must decide the most productive use of the time available. In general, the agenda covers the following items.

- **Welcome.** This self-evident item should be done at all meetings using a positive tone to set the right climate for discussion and problem solving.
- **Review Agenda.** Go over the items to be discussed and note who is responsible for each item with an indication of roughly how much time should be spent on each agenda item.
- **Overall Project Status.** First, provide the big picture by showing where things stand in relationship to the overall project plan as well as progress since the last review meeting.
- **Deliverable Owner(s).** The purpose is to review each deliverable (assuming there is more than one in the plan) so that “deliverable owners” can share and discuss problems; get help; present progress; and show accountability for results. Some problem solving and action planning may be necessary.
- **Organizational Intelligence.** This comes from several levels and should give the team a chance to learn as much as possible about anything affecting their work. Some problem solving and action planning may be necessary.
- **Risk Management Assessment.** Even though a risk assessment may have been done before the project commenced and at the project launch, it is always a good idea to check with the team to see if anything has changed. Item 5 on the agenda, organizational intelligence, may help to assess old and new risks.
- **Action Items.** Good meetings are ones where people have a good discussion, resolve things and leave with a feeling of responsibility for the performance of the project team. Owning an action item helps to build people’s commitment.
- **Next Meeting Date.** Make sure everyone knows when it is and clarify any follow-up responsibilities to be reviewed at the next meeting.

**Meeting Effectiveness.** Table 9.5 shows twenty guidelines to make meetings more effective. They are designed to help the project leader or meeting owner to produce a positive, upbeat atmosphere, be well organized, and get things done. In general, since it can be difficult to get busy consultants to attend meetings, one of the things that team leaders do *not* want is that their consultants believe they are constantly attending poorly run meetings!

**Table 9.4 Project Status Review Meeting Agenda**

<p><b>PROJECT STATUS REVIEWS</b></p> <ol style="list-style-type: none"><li>1. <b>Welcome</b> (Project leader or meeting owner)</li><li>2. <b>Review Agenda</b></li><li>3. <b>Overall Project Status:</b><ul style="list-style-type: none"><li>• Degree completed</li><li>• In-Process</li><li>• Not yet started</li><li>• Off schedule; why?</li></ul></li><li>4. <b>Deliverable Owner(s)</b><ul style="list-style-type: none"><li>• Current Status toward completion</li><li>• Problems/opportunities/significant changes</li><li>• Needs; resources requirement changes</li><li>• Any changes to scope (deliverable or project)</li></ul></li><li>5. <b>Organizational Intelligence</b><ul style="list-style-type: none"><li>• Client feedback (not team members; not affected by the projects)</li><li>• Client feedback (from those directly impacted by the project)</li><li>• Project team member's feedback</li></ul></li><li>6. <b>Risk Management Assessment</b> (people; financial; business, etc.)</li><li>7. <b>Action Items:</b><ul style="list-style-type: none"><li>• Summarize for deliverables</li><li>• Summarize for overall project</li><li>• Owners of each action item</li><li>• Next Steps</li></ul></li><li>8. <b>Next Meeting Date</b> (for project status review)</li></ol>
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Regardless how well meetings are conducted, the broader reality is that most projects experience problems at one time or another. How such problems are managed is a measure of the consulting team's quality -- how they handle themselves during difficult moments when things need to be kept under control. It might be worth remembering that a team's character is truly tested when things are not going well, not when things are going smoothly.

At project progress review meetings, the focus is usually to understand the current status of technical, people, political, process or team issues. When problems inevitably occur, it is worth bearing in mind that the challenge of review meetings is not necessarily finding a solution in the shortest possible time. The focus is to remind the team that their job is to control the project in such a manner that keeps the confidence level of the customer high at all times.

**Table 9.5 Meeting Essentials**

1.	Be clear about the <u>type</u> of meeting (sharing; decision; getting input; brainstorming)
2.	Have a clear <u>objective</u> (outcome) in mind.
3.	Issue a clear <u>agenda</u> and all information/material in advance
4.	Ensure there are <u>no interruptions</u> .
5.	Start on <u>time</u> & finish on time.
6.	All attendees should arrive <u>prepared</u> .
7.	<u>Stick to the agenda</u> (including time limits).
8.	Deal with <u>facts</u> , not guesswork.
9.	Treat other's opinion with <u>respect</u> .
10.	Speak up if the session is <u>unproductive</u> or getting nowhere.
11.	Seek <u>each person's opinions</u> and ideas.
12.	Seek <u>consensus</u> , not compromise.
13.	Recommendations made by the group should be <u>agreed to by the whole group</u> .
14.	Use <u>meeting time</u> for the meeting.
15.	Create <u>memory</u> : use flipcharts, whiteboards, overheads, laptops.
16.	Ensure some means for keeping a <u>permanent record</u> (i.e. minutes).
17.	Have a <u>seating arrangement</u> helpful to group process/discussion.
18.	Select a <u>time of day best</u> for meetings.
19.	Make any <u>assignments clear</u> during the meeting.
20.	Circulate any and all <u>follow up</u> materials immediately following the meeting.

## DATA GATHERING

To design and build a deliverable consultants must gather a great deal of data and gain insight about their client's existing set of circumstances. For example, information about: industry issues, legacy systems, existing performance standards, new performance requirements, general business conditions, the existing organizational structure, the company's culture, its procedures and existing documentation. These disparate items of information form the starting point for the Designing, building and Producing phases of consulting. At McKinsey and IBM, for example, data gathering must be done very systematically, be fact-based, be focused on the right issues, validate hypotheses, use analytical and contextual thinking, and utilize a wide range of methods. Consulting at such firms is a very rigorous process and requires their consultants to refine their thinking and findings, and be prepared to have their conclusions tested and validated.

**Systematic Data Gathering.** A data gathering process such, for example, action research, requires careful planning and implementation. It must have a clear scope, goals and a strategy. It must be done in a disciplined way by people who are trained in the various data gathering methods used and who

can ensure the highest level of objectivity is achieved. Procedures for the collection, collation, syntheses and reporting of data must be rigorous and used uniformly by all consultants doing the data gathering. Many consulting projects require several phases of data gathering each of which may broaden the reach of areas to research, or go to new levels of detail. As new insights are garnered from each iteration of data gathering, the research strategy may have to change to ensure the scope of the problem is examined in sufficient depth and hypotheses are thoroughly examined.

**Hypotheses Driven.** A hypothesis is a theory developed to explain the cause-effect relationship in a problem. There may be several hypotheses we believe are causing the problem to exist and each theory must be tested for accuracy and validity. Data gathering produces facts about a situation and provides the evidence that each hypothesis is either right or wrong. Once we believe that hypothesis has been proven we are in a position to develop solutions to the problem. Of course, how we describe the problem shapes the very hypotheses we develop to explain it and therefore the strategy we use to test them through data gathering. Therefore, we must be very careful about how we frame the problem in the first place and give very careful thought to the various ways a problem can be viewed. Making this process even more complicated is the very way in which the human mind works – our “thinking styles” – that is, our ability to process information both analytically and contextually.

**Analytical Thinking Style.** The most natural and normal thought process we experience in every-day business and consulting life is *analytical* thinking. It is a way of thinking ingrained in us from years of training and education. It is a direct use of the western scientific tradition known as “empiricism” which uses the objective observation of reality and the testing of hypotheses to establish and assert truth about reality. Analytical thinking is data driven, reductionist, comparative, rational, and logical in its form. It takes a problem and breaks it apart into its constituent elements in order to see granular cause and effect relationships. Causes of problems are determined from these relationships.

With analytical thinking, consultants ask questions such as: What is broken? What does not work? How does this compare? Contrast? Consultants look at results compared to standards and deviations from the norm. Analytical thinking uses tools and methods such as root cause analysis, the program evaluation and review technique (PERT), flow charting, experimentation, de-engineering, mathematics, scorecards, statistical sampling, controls, value chains, supply chains, planning, Gantt charts, variation analysis, and budgeting.

**Contextual Thinking Style.** *Contextual thinking* (also known as *systems thinking*) examines a problem as it exists in relationship to the larger space or environment of which the problem is a part. Contextual thinking requires seeing the whole as a collection of sub-systems much as an organization is made up of layers of management, coordinating systems, and business functions. Each of those organizational sub-systems has its own organizational purposes and functions that can be understood (in part) by the way it *interacts* with other sub-systems. Interestingly, a problem may reside in the interaction *between* sub-systems, as much as it may reside *within* any one of them (see Burke, 2008, pp. 49- 64). This

is a very useful perspective for consultants to consider in the Building and Producing stage of consulting to ensure the right problem has been solved and when solutions are implemented, the impact of the solutions on other systems is considered.

Whereas *analytical* thinking focuses on the inner workings and logic of a sub-system, *contextual* thinking considers: 1) the purpose of the sub-system and 2) how it interacts with the other sub-systems (for example how one business function (let say manufacturing) is connected to other business functions (such as marketing and human resources) or how one department interacts with other departments. By thinking contextually consultants may discover that the real problem lies in how sub-systems (in an organization) *interact* with one another, not within any given functional sub-systems itself.

Clearly, analytical and contextual thinking are both important methods and perspectives for solving problems during all stages of consulting. Consultants must keep both ways of thinking in mind as they decide on 1) the data that must be gathered to understand the nature of the problems they have been hired to solve, and 2) the focus of the questions that in turn, influence which data gathering methods to use.

**Methods of Data Gathering .** Data gathering for consultants is the same as what lawyers refer to as the “discovery” phase. It is important that consultants complete a thorough job of fact-finding. McKinsey, for example, prides itself on its fact-based analysis of business problems and they assiduously use facts to support or deny the validity of the working hypotheses about the causes of a problem under investigation. It should be of obvious that data gathering is critical for building and producing excellent deliverables. Solutions must be grounded in business and organizational realities, and analysis must be fact-based in order to create realistic and practical solutions.

The importance of fact-based data gathering means that consultants should be well-trained in the various tools and techniques used to complete this phase of the consulting process. Each consulting firm has its own preferred methods, tools, forms, systems and procedures for data gathering. However, there are standard methods used by all consultants. We recommend consulting a standard text on research methods to understand fully the pros and cons of each method (see for example, Lehmann, 1979; Sekaran, 2003). The most common data gathering methods used by consultants are:

1. Interviewing
2. Surveying
3. Focus Groups
4. Documentation Analysis
5. Observing

There is no perfect method for gathering the facts. All data gathering methods are subject to bias and data distortion. So, consultants must be conscious of those sources of bias and try to eliminate them as much as possible. Since there are many subtleties to research and research methods and bias occurs easily, it is highly recommended that in addition to receiving formal education in research methods, junior

consultants also receive coaching by experienced, senior consultants before they perform any data gathering in a client's organization.

The soundness of deliverables, solutions, and recommendations are directly related to the efficacy of the data gathered and value of the insights found in the information. Consultants must be competent in statistical analysis, detecting themes and patterns in the data, as well as drawing conclusions and recommendations from their analysis. Consultants must be trained in understanding how to remain objective as they interview clients; how to ensure random samples are taken of client populations; and how to conduct precise observations of client operations. Training in objectivity is essential.

**The Heisenberg Effect.** Before a consultant enters a client organization to do "discovery" an thing, formal training must be provided not only on data gathering methods but also on the impact of data gathering on the perceptions and feelings of clients' employees. Data gathering is an intervention into a client's organization and careful consideration of the impact of such an intervention is very important (Block, 2001). Since the data gathering phase of any consulting engagement is a time when consultants work closely with individual employees, groups, departments, and the management of a client's organization, the very act of gather information changes the client system. This is the Heisenberg effect where the presence of a consultant-researcher effects what it is being examined. That is, the act of data gathering affects the data gathered.

With problems of bias, effects on the client systems, and the specific skills needed for each type of research method, consultants must be well-trained to do it professionally. Before the process starts, it is wise to ask such questions as:

- What data gathering method (s) will be used?
- How will data be gathered, synthesized and reported?
- Who will do the data gathering?
- Are the researchers qualified?
- What attitudes will be conveyed by the consultants?
- What impressions will researchers make on the Client?

In the journey of becoming a trusted advisor, it is critical to perform data gathering in the most professional way possible, using the best inter-personal, diplomatic and politically sensitive skills possible. Clients will judge the quality of both the individual consultant and the consultant's firm on how well this phase of work is accomplished. In short, consultants can generate enormous goodwill and cooperation if they conduct this work correctly, or customer cynicism and resistance if they do not.

### NAVIGATING ORGANIZATIONAL POLITICS

Organizational politics comes into play perhaps more than at any other time during the Building and Producing stage of consulting. This stage is when consultants may be “swarming” around the client’s organization, asking hard questions, poking around for issues and problems, challenging long-held employee assumptions, and testing management’s thinking. It is likely that “feathers may be ruffled,” tense debates may ensue, and the client’s natural instinct to protect and preserve the status quo may surface as win-lose power plays. If they are not careful, consultants may be seduced by the client’s political games, co-opted on issues, driven to despair, or perhaps become cynically competitive. A few concepts and skills about the nature of organizational politics can be helpful at this stage.

**Political Perception.** The first thing that consultants must realize about organizational politics (OP) is that it can be a *good thing* as well as a bad thing. Most of us have positive and negative experiences with organizational politics starting with our personal family as we learned things about the use and abuse of power, authority, influence, reward and punishment. Many people carry the negative aspects of family politics into adulthood and thus into the work place where perceptions and feelings are often reinforced with additional bad politics. People associate organizational politics with situations where someone is taken advantage of; someone gets hurt; someone gets ahead without merit; someone is overlooked and should not be; or someone is deliberately set-up to fail. All of those are real experiences from the past and can leave us with very bad beliefs about organizational politics and thus effect our ability to deal with it realistically and effectively.

However, organizational politics can also be looked at in quite a different way. Organizations are a group of people with a political agenda who have come together to accomplish something they could not do on their own.

**Politics is a conversation.** Organizations are people working with people, interacting with one another through coordinated and orchestrated *conversations*. Therefore, we can conceive of organizations as nothing more than a series of normal and natural political conversations designed to accomplish individual and collective goals. This view raises important questions about such conversations. What is the focus, nature and quality of the conversation? What is its content? Who is leading it? What issues are included or excluded? Who is in the conversation and who is not? Are they credible and reliable conversations? The answers to those questions tell us a great deal about the content and process of a client’s organizational politics. It follows that consultants must be in the political conversation of a customer’s organization to be effective and successful.

**How to Think about Politics.** The central role of organizational politics is the exercise of power and influence to get things done. In fact, it is the primary way in which things are done – through the political conversations between people as they communicate, solve problems and make decisions day-in

and day-out. This is a positive and constructive view of organizational politics and one that it is both *natural* and *necessary* to move an organization forward.

It does not mean that organizational politics cannot be negative. That depends on the *values* of the persons exercising power and influence. Political conversations can be for personal gain, at other's expense, solely for personal credit, and even to eliminate rivals. They can also be used for a good cause; directed toward the common good. Either way, consultants need to be aware of the political conversations going on and decide *how* to be a part of them. To ignore organizational politics or look upon it with fear or disdain is to put oneself at a disadvantage and to be on the outside of the "inner workings" of the client organization. In these sense, the political goal for consultants is to become part of the inner circles of power and influence in the client's organization.

**Shaping the Perception of Power.** Consultants who use their political skills to advance project and business goals must learn to do so with influential players in their client's organization. This is part of the journey of becoming a trusted advisor where consultants act consciously to shape the client's perception of the value of the consultant's behavior and ideas. Such shaping in organizational politics is known as "impression management" as consultants acquire power to influence events, resources, strategy, people's behavior, and outcomes.

If organizational politics is the exercise of power and influence, what is power and what is influence? First, in essence power is energy. It is available to all of us if we choose to use it. How we use that energy is a *state of mind* enhanced by tactics that increase other people's belief in the amount of power we have. As a state of mind, personal power emanates from within and is communicated through the force of language. That force of language is at its maximum when *what* we choose to communicate reflects our core beliefs, our values, and what we stand for in life. Consultants must be clear about their core beliefs and values: first as human beings, then as consultants, than as *professional* consultants. For most people, core values reflect such things as always having integrity, being credible, reliable and intellectually honest. It means standing for what is right over what is expedient and never violating personal principles. Consultants who live and communicate that way have power, because those things are powerful, having stood the test of time throughout history where their invocation has separated the eternally powerful from the temporary ones, who use only fear or reason, facts and logic. Logical reasoning is powerful, but not as much as the expression of our personal values grounded in universal principles (see: Kohlberg, 1981; Power, Higgins, Kohlberg, 1989 for a rich discussion of this topic). Most social activists' movements ultimately achieve their goals this way. (It should be noted that such power can [and is] used in the worst way when it is used to seduce others into anti-social acts, the extreme form of which is terrorism. It is so powerful, that when certain core values are aroused to convert others, they willingly give their own lives for the cause).

**Sources of Power.** While consultants may exercise power from their core beliefs and values, they can also add four other sources of power that are tactical in nature (Kreitner, 2007):

1. **Reward.** The consultants ability to grant tangible and intangible rewards to those who comply with a command or request, gain such rewards from them.
2. **Expertise.** Consultants are expected to have expertise. Possessing and dispensing of valued expertise and information compels those who need it to comply.
3. **Referent.** Consultants who know important people in the client organization can use this connection to gain power. By identifying with or wanting to know important people, client people may comply with the consultant on that basis alone.
4. **Legitimate.** A consultant's assigned rank or role (as project leader, for example) that includes authority to make decisions over others, prompts others to act in a desired manner.

Other sources of power exist, such as [negative] coercive power where fear is used to influence people to behave, agree, comply, or act in a certain manner. Such negative power strategies can produce compliance in the short run, but often lead to conflict and defensiveness and should be avoided by consultants. Positive power strategies grounded in universal humanistic principles and values that produce long-term client relationships are the keys to increasing a consultant's power base and growing other people's perception that the consultant has power and influence.

**Influence Skills.** Secondly, the work of consultants requires an ability to influence others. Influence is the outcome of the exercise of power and occurs when others comply with the consultants wishes, but in a way they want, like, enjoy, and fully support with one hundred percent commitment. Obviously, consultants do not want to make people angry and upset with their work and behavior. The best influence is when the client voluntarily agrees with the consultant's request. The client sees the benefit, agrees with the argument, complies, and becomes committed to the common goal. Such influence requires consultants to be skillful in their verbal communications behavior. In the 1930's Dale Carnegie provided many simple and useful ways to influence people and subsequently trained people in the art of influence (Carnegie, 1991). The work of Berlew and Harrison (1979) provided additional verbal strategies of influence:

1. Express core humanistic values and principles that govern a decision.
2. Argue and debate using reason, facts and logic effectively.
3. Prescribe what is needed in exchange for something.
4. Be empathetic and listen actively, including being fully "present" with other people.
5. Share and disclose personal views thereby demonstrating greater vulnerability.
6. Passionately and authentically articulate a vision of what may be possible.
7. Use humor and good-will to create a positive climate of agreement and support.

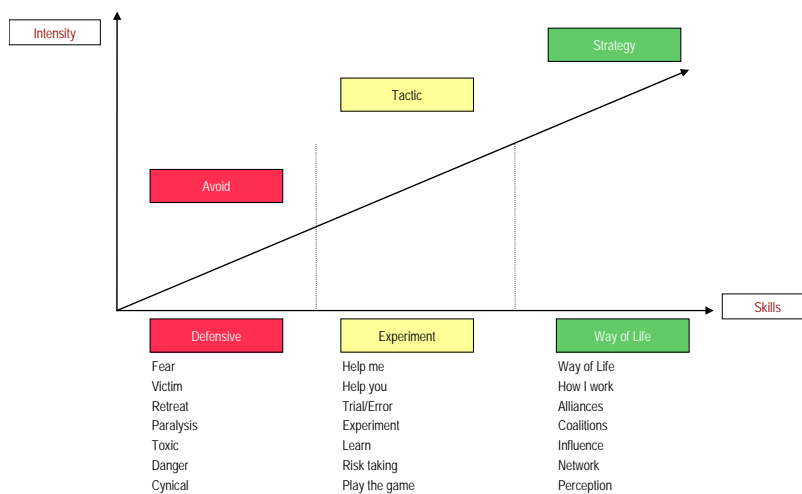
**Developing Political Skills.** If the context is that politics is a conversation directed toward achieving project and business goals, then the stronger a consultant's skills in that conversation, the more will be accomplished. However, political skills have to be developed. Figure 9.2 shows the stages and

skills needed by consultants at different levels of their political development. Two dimensions help us to understand the nature of organizational politics: the *level* of our political skills and the *intensity* of the organizational politics in any given organizational situation (Eldred, 2000). Skill level simply refers to our existing confidence and ability to think politically and to take appropriate action. Intensity refers to the degree to which decision-making is political charged. Several things affect political intensity: organizational complexity, ambiguity, and uncertainty. Higher levels of each of those variables make political sensitivities more acute. For example, organizations that are growing rapidly or going through a lot of change (new products and services, mergers and acquisitions, geographical expansion, rapidly declining profits, etc.) tend to be politically intense. Therefore, in consulting, the higher the level of political intensity, the more political skills and “savvyness” are needed by consultants to be successful.

Note that at the lowest level of intensity we do not seem to need political skills. However, this is deceptive because all organizations are political (some level of political sensitivities always exists in a social organization). Therefore, even at the lowest level of intensity, consultants still need to be political (in the best sense of the word).

Quite often, based on personal experiences, observing organizational politics or just hearing about it from colleagues, consultants tend to treat politics with caution. Most consultants start their careers with a minimum amount of political savvy. Most people start-off avoiding organizational politics. It seems dangerous. We wonder about organizational politics but conclude it is a mystery and generally something hard to understand; best to be avoided. The best consultants take organizational politics seriously and spend time developing their organizational political capability. Figure 9.3 outlines the major areas required to develop such political capability.

**Figure 9.2 Stages of Political Skills Development**



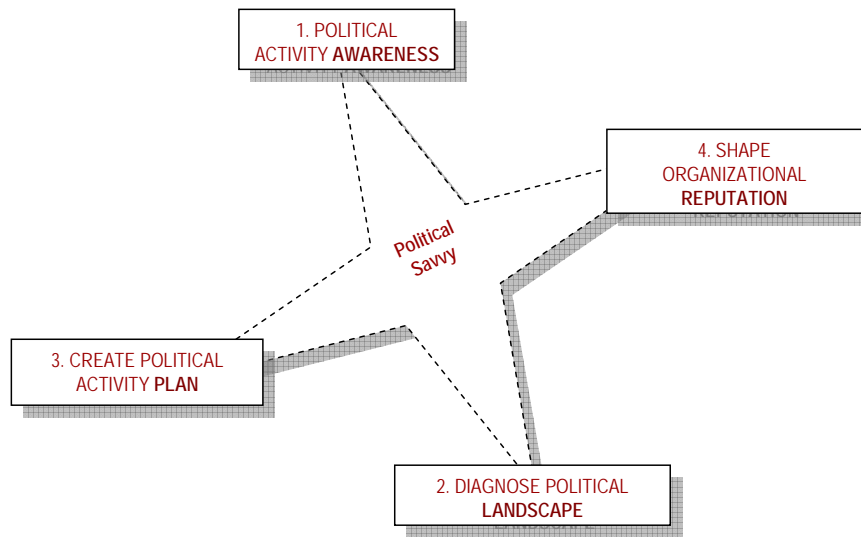
Adapted from J. Eldred, "Mastering Organizational Politics and Power"

**Developing Political Intelligence.** Avoiding organizational politics is both naive and a mistake. It is understandably hard to comprehend and perhaps even harder to see in a positive light. Nevertheless, since organizational politics is both necessary to getting things done and a natural phenomenon among people in a social organization, consultants must start the journey of becoming politically savvy. Four steps are required: 1) developing personal political awareness; 2) diagnosing the political landscape; 3) creating a political activity plan; and 4) shaping one’s reputation (i.e., impression management).

At the start of a consulting career, many consultants may have strong negative feelings about organizational politics, seeing it as toxic, petty, dangerous, and to be avoided. The consequence of this attitude can leave a consultant disenfranchised, disempowered, unable to exercise influence and worst, unable to add value by being *disengaged* with the inner working of the client organization. Therefore, the first step is to “get in the game.” Realize that organizational politics is a game with rules, players, timing, goals, winners and losers.

At the earliest possible moment, consultants must get in the game and shift from the stance of “avoidance” to one of being “tactical.”

**Figure 9.3 Developing Political Skills (Savvy)**



1. Political Activity Awareness	<ul style="list-style-type: none"> <li>• Personal Experience with Politics</li> <li>• Current Level of Political Skills</li> <li>• Desire for Growth and Development</li> <li>• Emotional and Political Intelligence</li> </ul>
2. Diagnose the Political Landscape	<ul style="list-style-type: none"> <li>• Players Power Distribution</li> <li>• Political Intelligence Data</li> <li>• Positions on the Issues</li> <li>• Political Culture</li> </ul>
3. Create a Political Activity Plan	<ul style="list-style-type: none"> <li>• Networking Plan</li> <li>• Engagement Plan</li> <li>• Alignment Plan</li> <li>• Negotiation Plan</li> </ul>
4. Shape Impression Reputation	<ul style="list-style-type: none"> <li>• Project Goals</li> <li>• Career Interests</li> <li>• Enhancing Power</li> <li>• Issues Analysis</li> </ul>

Developing political skills requires acknowledging that politics is going on all of the time; everywhere in the client organization. Consultants must start to think tactically:

1. Ask political questions
2. Assess where the power lies
3. Identify the powerful people who can impact the consulting engagement
4. Develop a plan to build a network of relationships
5. Engage the identified network to learn about their goals and needs
6. Become aligned within the power network
7. Influence the network to gain direct support and assistance.

When playing the political game it is possible to learn about one's political strengths and weaknesses. Consultants must learn to take risks and to test their courage; push through the fear that naturally surfaces in the face of potential conflict. Consultants must learn what works and what does not; start to build a network of relationships and realize that there are people in the client organization have a need *to foster a relationship with us*, for their own good reasons. This is part of *their* political strategy. Over time, by testing, exploring and learning about the client's political climate and dynamics, consultants test themselves and increase their understanding of what it takes to be politically successful. Courage replaces confusion and skills replace doubt. The skills learned in one client situation can then be taken to the next and as the scope of the consulting expands, they will be better positioned to lead bigger and more complex assignments.

At some point in the political journey, the tactics and processes become so internalized that organizational politics becomes a natural way of working in the client organization. Experienced consultants recognize the turning point when at the beginning of an engagement, they automatically think strategically about the political landscape affecting an engagement. They engage their network of alliances to negotiate for other people's support, time, resources, commitment, and help. Such consultants, who have systematically built alliances and coalitions of political support for their work, find it easier to get decisions made, build deliverables and produce results with a wide range of people. Their project management is more efficient; implementation of plans is more effective; and producing deliverables are executed with higher levels of efficiency and effectiveness.

**Final Note.** Consultants will not always win the political game. It is normal that in any given client setting there will be some managers and employees who simply do not like consultants. Powerful client managers may resent consultants being in their organization asking awkward questions, demanding time, and pointing out flaws and organizational problems. They see consultants as intruders who are paid a lot of money to ask managers awkward questions, offer their recommendations, build solutions, and then leave the managers to implement them! As a result, there are often hidden, counter pressures of resentment among client managers who may be looking for ways to sabotage consultants. It is as if they want the consultants to lose and disappear. This is a political issue. Politically savvy consultants know

this resentment may exist and may cause them to lose a political fight. However, they should not let it be a barrier to progress. Drawing upon their power bases, politically savvy consultants counter this pressure by developing the widest possible coalition of support – one that is multi-functional *and* multi-level.

A broad-based belief among client management that a consultant is powerfully connected, is a natural antidote to political sabotage. Keeping their own futures in mind, savvy client managers will be cautious about what they say about the consultants. They will be more inclined to provide support than not. So long as consultants “live their values,” do not break confidences, always put the client first, and find ways to help and support client management achieve their goals, the odds are in favor of winning the political game. Not winning at the expense of the client, but in favor of building long-term, trusted relationships.

### MANAGEMENT ISSUES

The building and producing stage in consulting demands that consultants ensure a number of tasks are taken care of, in addition to political dynamics, managing meetings effectively, and handling performance problems with effective coaching. For example, throughout the entire consulting engagement, *records* must be kept of meetings, decisions, plans, budgets, key issues, and insights. Documentation is a tedious task for consultants who prefer to spend their time applying their knowledge and expertise to solving problems, not keep administrative records. Yet, it is imperative to keep accurate and up-to-date records for legal reasons as well as good project management practice.

**Knowledge Management.** One way consultant’s add-value is by expertly managing the storage and dissemination of knowledge. Through the course of an engagement data and huge amounts of information are generated. Important questions arise such as: How can this be captured and accessed? What needs to be reported and in what format? To whom should information be reported and for what purpose? Client management expects to be kept abreast of insights and learning. As solutions are developed, consultants see and hear about a broad range of managerial, operations, and strategic issues facing the client organization. Files and data bases of information need to be kept orderly and up to date. Appropriate confidentiality protocols must be established and implemented. Every day, each consultant must update the files, summarize data collected, insights uncovered and progress made. Project leaders must be able to access the files and know exactly where things stand on each issue under investigation and the status of each deliverable. On large engagements, this is key to synthesizing findings and ultimately making valid recommendations. This process is one of the reasons consultants are hired in the first place. They use defined processes and tools in systemic ways that enable large bodies of information to be analyzed and synthesized. From this process consultants give advice on solutions to their client’s business problems.

**Administrative Systems.** In addition to knowledge management, consultants are expected to use standard administrative systems in their work. Sometimes they are expected to use their client’s systems.

Consultants must have their own systems for planning, budgeting, controlling and reporting progress throughout an engagement. This is especially important during the building-deliverables-phase of the work when important decisions are being made across a host of issues critical to the delivery of a solution.

Usually, deliverables are built according to a plan of agreed-upon specifications and against deadlines. Consultants must demonstrate they have detailed project plans and can deliver according to the plan. Client management will accept missed deadlines if they believe there are good reasons (especially those caused by the client). Consultants simply must be able to show the detail, data, documents, and deviations from plan. They must be able to provide good reasons for adjustments to the plan and effectively negotiate new goals with client management. The key is to demonstrate that administrative systems are in place and provide the information and insights to support any decision making.

**Project Meetings.** We have already looked at the basics of running a good meeting. Needless to say, clients expect consultants to be able to lead meetings effectively. Kick-off meetings, technical reviews, project status meetings, reviews with management and steering committee updates, must be handled professionally, following the guidelines outlined earlier in the book.

**Conflict Resolution.** From time to time, consultants face severe problems with people on engagements and projects. There might be significant performance problems with team members, disputes with client management, disagreements about scope and specifications, as well as having to deal with dramatic new expectations that arise on any long-term project. Each consultant and the team leader have an obligation to handle conflicts professionally. It is a safer approach for consultants to assume responsibility for conflict resolution; and to demonstrate how to resolve problems in a timely and professional manner. This is all part of the added-value that consultants bring to their work. A helpful way to think about this is to realize that resolution of conflicts requires understanding their origins and sources.

Generally, the origin of tension between people can be traced back to three things: 1) miscommunication; 2) blocked intentions; and 3) unfulfilled expectations. The tension turns into disputes when people disagreeing over four issues: goals, values, methods, and facts (Schmidt, W., Tannenbaum, 1960). Conflict resolution requires clarifying what the disagreement is about (goals, values, etc.) and the source of the tension (communications, intentions, or expectations). Through careful examination of those issues and tensions, and using emotional intelligence, active listening skills, and political skills, consultants must negotiate conflicts to mutual satisfaction. Effective consultants acknowledge emotional tension, but never allow the emotions of conflicts to get in the way of building trust and building long-term relationships. Sometimes, just keeping those two goals in mind, can help a consultant overcome emotional barriers that may be doing harm. In the midst of an emotional dispute, such “superordinate goals” can alter our way of thinking away from “ANTS” (automatic negative thinking syndrome) to something more emotionally intelligent.

**Poor Performance.** Team members make mistakes. Team members do not always do what they are supposed to do. Team members can and do perform poorly. As already discussed earlier in this chapter, the answer to poor performance is coaching. In a straight forward, adult manner, poor performance must be dealt with; it cannot be tolerated so that things worsen. It is the obligation of all consultants on the team as well as the team leader, to step-up to the coaching responsibility. Generally speaking, with team-member-problems clients care far less about the process than they do about results. To some extent, clients will even allow sub-par performance for a while if they know it is being handled internally. But, clients do expect their consultant to take care of performance problems and to be a role model for the process used.

**Celebration.** It is normally the case that consultants celebrate twice: 1) when they first win the business; and 2) when they complete an engagement. Unfortunately, with all of the pressures and stresses that accompany many assignments, consultants do not celebrate enough and may only celebrate once -- upon winning a piece of business. Even that may be foreshortened when someone faces reality and points out that *now they must deliver the business!*

Occasionally, clients may be generous and ask their consultants to lunch or dinner to review and debrief the production of important deliverables; however, usually they do not. So, it is up to the consultants to make sure some kind of celebration happens. Celebrations are important moments to reinforce cultural values, boost morale, and build team cohesion. It can be an enjoyable experience to tip a few drinks and have a few laughs with colleagues while reviewing how deliverables were produced. It can be a great source of learning, insight and even creativity that can be carried forward to the next deliverable and ultimately the engagement overall.

**Building and Development Methods.** Every consulting company has its own way of doing things; its own methods and protocols. Part of learning to be an effective consultant is learning those methods and processes. Certainly, clients expect their consultants to bring to them tried and tested ways of working; clients may also expect consultants to use the client's own internal systems and procedures. Included in the step of managing expectations discussed in chapter five, is a discussion of methods and how they are used to produce deliverables. They form the underlying structure behind project plans, as consultants and the client determine how work will be accomplished.

It is beyond the scope of this chapter and book to discuss the numerous methods and processes used across the many areas of consulting practice. However, in general, Table 9.6 shows typical (high level) steps used in each type of consulting.

**Table 9.6 Typical Procedures across Consulting Applications**

TYPE OF CONSULTING	TYPICAL PROCEDURES
Strategy Consulting	Fact based data gathering; issue analysis (MECE); summary analysis; conclusion; presentation of recommendations.
Organizational Development Consulting	Needs analysis; contracting; intervention; commitment to action.
Training and Development Consulting	Needs analysis; diagnosis; recommendations; design; development; program testing; roll-out delivery; train-the-trainer, transfer.
Technical (Tax, Accounting, Law, Medicine) Consulting	Tick lists; discovery interviews; document analysis; examination of precedent; evidence analysis; case development and conclusion.
Information Technology Consulting	Systems analysis; architecture development; application coding; prototype testing; skills transfer deployment; roll out; follow-up

## CONCLUSION

In this rather lengthy chapter, we have outlined the key areas of work needed to build and produce deliverables. This stage of consulting draws upon all of the core interpersonal skills already mentioned in previous chapters and is a logical extension of the tasks and competencies required in stages one and two of the consulting process.

Building and producing deliverables is a complex process made even more so by the requirement of working in the client’s organization. The client’s organization is not a consulting firm full of semi-independent entrepreneurial consultants. More often than not, client organizations are very large, complex, politically intense, bureaucracies full of employees trying to get ahead (or simply hold on to their jobs). Competition among employees is high; pressure to produce results is constant; and everyone feels overwhelmed with the amount of work to be done. This puts a premium on consultants having high levels of emotional intelligence; an ability to work in teams; build high performing teams; using very good projects plans; having excellent communications skills; and an ability to work with a diverse work force across all business functions and levels of management.

Since it is common that consultants are, to a degree, resented by clients, they must have the ability to resist cynicism about client attitudes and positively relate to the client’s business, organizational culture, internal language, and ways of working. Building and producing deliverables requires being able to become a temporary “employee” of the client’s organization while retaining professional distance. It requires being politically smart by advocating and advising while listening and being diplomatic. Producing deliverables demands the use of tested procedures and protocols that ensure steady progress toward milestones and expected outcomes. Building deliverables requires teamwork, a bias for action,

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collaborative behavior, building consensus, and an ability to handle complex problems amid confusion and inadequate information.

The full-range of professional, technical, business, and interpersonal skills are needed during this phase of the consulting process because it is the most complex and demanding. It is the stage when solutions are formed and tested. It is the time when clients scrutinized every aspect of consultants' roles and competence. In the end, building and producing deliverables is the time when consultants demonstrate their true level of professionalism as they show the results of their work in the face of clients' resistance, criticism, skepticism, and caution.

If done well, however, consultants will be able to move smoothly into the final phase of work: implementing and deploying solutions -- the last step to becoming a trusted consultant.