Consulting on the Inside™
A Practical Guide for Internal Consultants
Objectives

➤ Define the role of the internal consultant
➤ Discuss how the internal consulting process works
➤ Address internal consulting challenges
➤ Practice Influence and Negotiation skills
➤ Apply the internal consulting career ladder and the concepts of consulting mastery
➤ Identify personal goals for consulting mastery
What are the key challenges for you in your organization?
What is a Consultant?

A consultant uses...

Expertise
Influence
Personal Skills

To facilitate...

A Client Requested Change

Without formal authority to implement recommended actions
Choosing a Role

Process  OR  Expertise
# Classic Consulting Roles

<table>
<thead>
<tr>
<th>Consultant Role</th>
<th>Description</th>
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</table>
| Doctor:         | - Diagnose  
                 - Make recommendations |
| Expert:         | - Provide expertise and solve the problem |
| Pair of Hands:  | - Use specialized knowledge to achieve client’s goals |
### Consultant Role

<table>
<thead>
<tr>
<th>Change Agent</th>
<th>Process Consulting</th>
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<tbody>
<tr>
<td>– Partners with client</td>
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<td>– Serves as catalyst for change</td>
<td>– Insightful systems observer</td>
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<td>– Asks astute questions</td>
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**Traditional Organizational Change Roles**

Consultant Role

- Partners with client
- Serves as catalyst for change
- Insightful systems observer
- Asks astute questions
## Emerging Consulting Roles

<table>
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<th>Consultant Role</th>
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<tr>
<td>Performance Consultant:</td>
<td>- Partners with client</td>
</tr>
<tr>
<td></td>
<td>- Systems focus</td>
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<td></td>
<td>- Supports performance improvement</td>
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<tr>
<td>Change Leader:</td>
<td>- Guides and drives change process</td>
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<tr>
<td></td>
<td>- Advocate and project leader</td>
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<tr>
<td>Trusted Advisor:</td>
<td>- Sounding board</td>
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<td></td>
<td>- Confidant</td>
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Challenges for Internal Consultants

Organizational Challenges

Interpersonal Challenges

Intrapersonal Challenges
Building Your Practice

➤ Setting the Stage at Hiring
➤ Building the Relationship
➤ Confidentiality
➤ Competencies for Success
➤ Becoming a Business Partner
The Process of Consulting

- Contact
- Agreement
- Information and Assessment
- Feedback
- Seeking Alignment
- Change Targets and Transition Strategies
- Implementation
- Evaluation and Learning

The process involves a cyclical flow among these steps.
Contact Phase

➤ Seek an understanding of the client’s organization or business need.
➤ Lay the foundation of the consultant-client relationship.
➤ Confirm the agreement on consultant and client roles, expectations, and the actions each will take.

➤ Define the need to be addressed and the goal or outcome to be achieved.
Information/Assessment Phase

➤ Gather information about the issue, the business, performance, and the organization.

➤ Assess or analyze the data and information collected.

➤ Gain an independent view and interpretation of the issues.
Feedback Phase

➤ Provide the client with the information or data.
➤ Seek acceptance or “ownership” of the data.
➤ Offer a consultant’s analysis or interpretation.
Seek alignment with the client on the desired outcomes or future state and the approach or intervention to be used to achieve it.
Change Targets and Transition Strategies

➤ Clarify which components of the system need to be changed.
➤ Identify necessary support and resources.
➤ Develop a transition strategy to navigate from the current state to the desired future.
Complete the intervention by providing guidance, coaching, facilitation, and leadership to implement the planned change.
Evaluate the success of the project with the client system by supporting the client’s reflection and identification of learned skills, knowledge, and self-awareness.

Explore enhanced knowledge, skills and self-awareness.
Influence Tactics

- Tell
- Sell
- Enlist
- Negotiate
- Facilitate
- Listen
- Attune
- Disengage
Receptive Influence Behaviors

INQUIRE
- Ask Open-ended Questions
- Draw Out

FACILITATE
- Pose Challenging Questions
- Clarify Issues
- Disclose

ATTUNE
- Identify with Other

LISTEN
- Check Understanding
- Test Implications
Expressive Influence Behaviors

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<th>Tell</th>
<th>Enlist</th>
<th>Negotiate</th>
<th>Sell</th>
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<tr>
<td>Suggest</td>
<td>Encourage</td>
<td>Describe Consequences</td>
<td>Offer Incentives</td>
</tr>
<tr>
<td>Express Needs</td>
<td>Offer Reasons</td>
<td>Refer to Goals and Benefits</td>
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- TELL
- SELL
- ENLIST
- NEGOTIATE
Influence Goals

**Goal:** How I will know that I have succeeded

**Criteria** for an effective influence goal:

- Flexible
- Observable
- Challenging
- Useful
- Supportive
Constructive Negotiation Process

- Finishing
- Closing
- Infrastructure
- Framework
- Foundation
- Blueprint
- IMPLEMENTING
- CONTRACTING
- REVIEWING OPTIONS
- IDENTIFYING NEEDS
- ESTABLISHING EXPECTATIONS
- PLANNING
Stages of Internal Consulting Careers

- Student
- Apprentice
- Practitioner
- Coach/Mentor
- Master
Self Management Issues For Internal Consultants

- Approval over Effectiveness
- Belonging over Integrity
- My Way over Our Way
- Multi-tasking over Self Reflection
- Confidence over Competence
Advice for Internal Consultants

➤ Know the business. Tie consulting interventions to real business issues and ensure they add value.

➤ Identify performance gaps or issues before managers do. Be ahead of the game.

➤ Recognize systemic relationships. Be a systems thinker.

➤ Build strong skills as a coach, teacher, advisor and strategist.
Advice for Internal Consultants

➤ Avoid pitfalls and barriers; learn detours. Be persistent in overcoming them.

➤ Pay attention to the trends; talk about them. Most importantly, make them relevant to the business.

➤ Develop the ability to work at all levels of the organizations and across boundaries.
Advice for Internal Consultants

➤ Know the financial picture, participate in business meetings, and ask questions.

➤ Be an educator about change, systems thinking, learning strategies, chaos and complexity.

➤ Develop personal mastery and be a constant learner.
“As for the best leaders, the people do not notice their existence. The next best the people honor and praise. The next, the people fear, and the next the people hate. When the best leader’s work is done, the people say, ‘we did it ourselves!’”

Lao Tzu
Personal mastery goes beyond competence and skills, though it is grounded in competence and skills. It goes beyond spiritual unfolding or opening, although it requires spiritual growth. It means approaching one’s life as a creative work, living life from a creative, as opposed to a reactive, viewpoint.

Senge (1990)