



# Consulting on the Inside™

## A Practical Guide for Internal Consultants



# What is a Consultant?

A consultant uses...



**Expertise  
Influence  
Personal Skills**

To facilitate...



**A Client  
Requested  
Change**

**Without formal authority to  
implement recommended actions**



**What are the key challenges  
for internal consultants in this  
organization?**



# Typical Challenges for Internal Consultants

**Internals must...**

- live at the edge**
- be congruent but marginal**
- avoid collusion**
- have impeccable integrity**
- cope with politics and the hierarchy**
- juggle multiple roles**
- choose to be an agent or advocate of change**



# Classic Consulting Roles

	Consultant Role
<b>Doctor:</b>	<ul style="list-style-type: none"><li>– Diagnose</li><li>– Make recommendations</li></ul>
<b>Expert:</b>	<ul style="list-style-type: none"><li>– Provide expertise and solve the problem</li></ul>
<b>Pair of Hands:</b>	<ul style="list-style-type: none"><li>– Use specialized knowledge to achieve client's goals</li></ul>



# Traditional Organizationl Change Roles

	<b>Consultant Role</b>
<b>Change Agent</b>	<ul style="list-style-type: none"><li>– Partners with client</li><li>– Serves as catalyst for change</li></ul>
<b>Process Consulting</b>	<ul style="list-style-type: none"><li>– Partners with client</li><li>– Insightful systems observer</li><li>– Asks astute questions</li></ul>

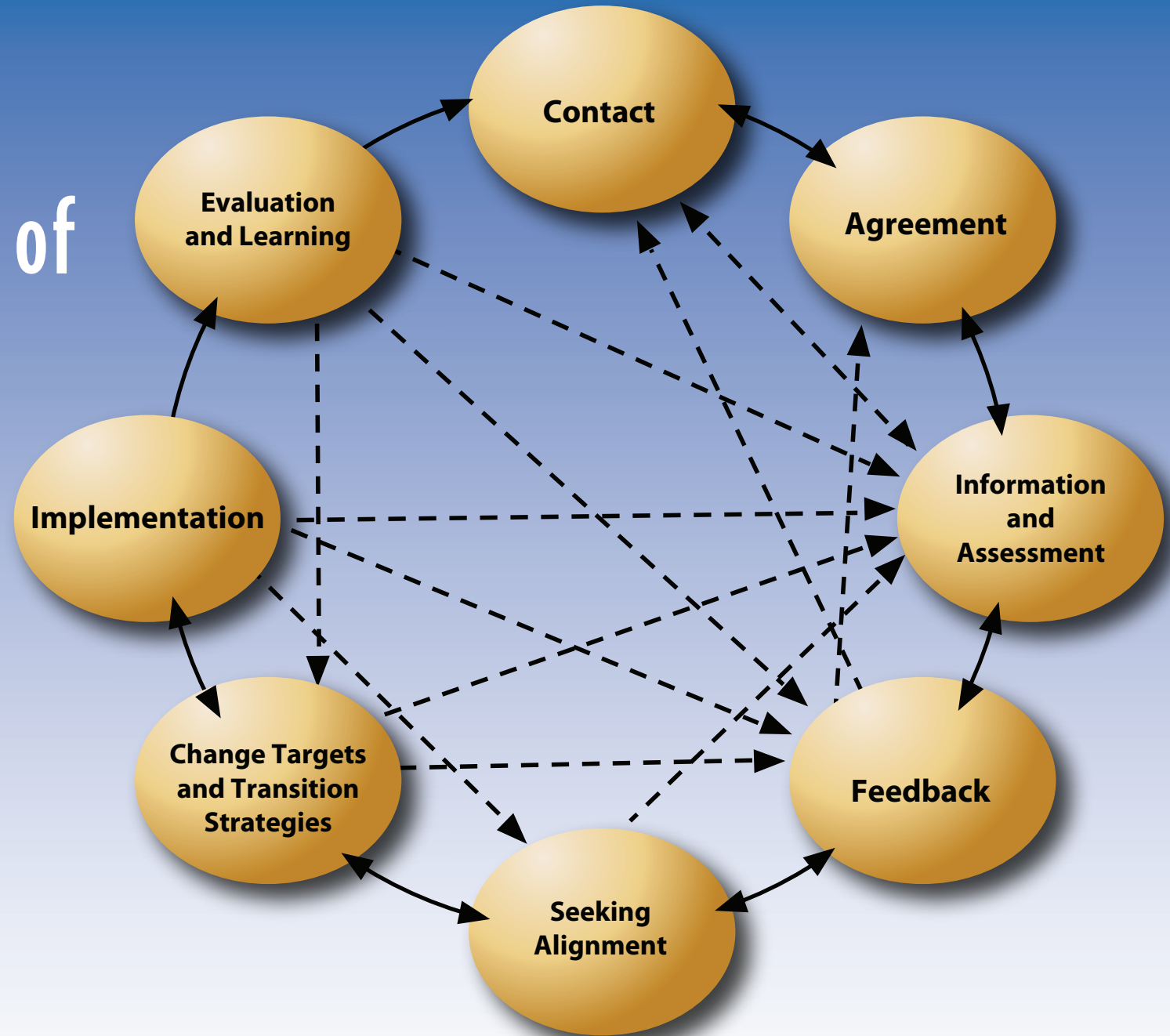


# Emerging Consulting Roles

	<b>Consultant Role</b>
<b>Performance Consultant:</b>	<ul style="list-style-type: none"><li>– Partners with client</li><li>– Systems focus</li><li>– Supports performance improvement</li></ul>
<b>Change Leader:</b>	<ul style="list-style-type: none"><li>– Guides and drives change process</li><li>– Advocate and project leader</li></ul>
<b>Trusted Advisor:</b>	<ul style="list-style-type: none"><li>– Sounding board</li><li>– Confidant</li></ul>



# The Process of Consulting



# Contact Phase: Successful Completion Requires

- Building the relationship with the client
- Seeking clarity and support from multiple clients
- Determining client readiness
- Identifying the business need or priority



# Agreement Phase: Successful Completion Requires

- **Clear mutual agreement about goals**
- **Clarification of expectations regarding roles and responsibilities**
- **Administration and logistics**



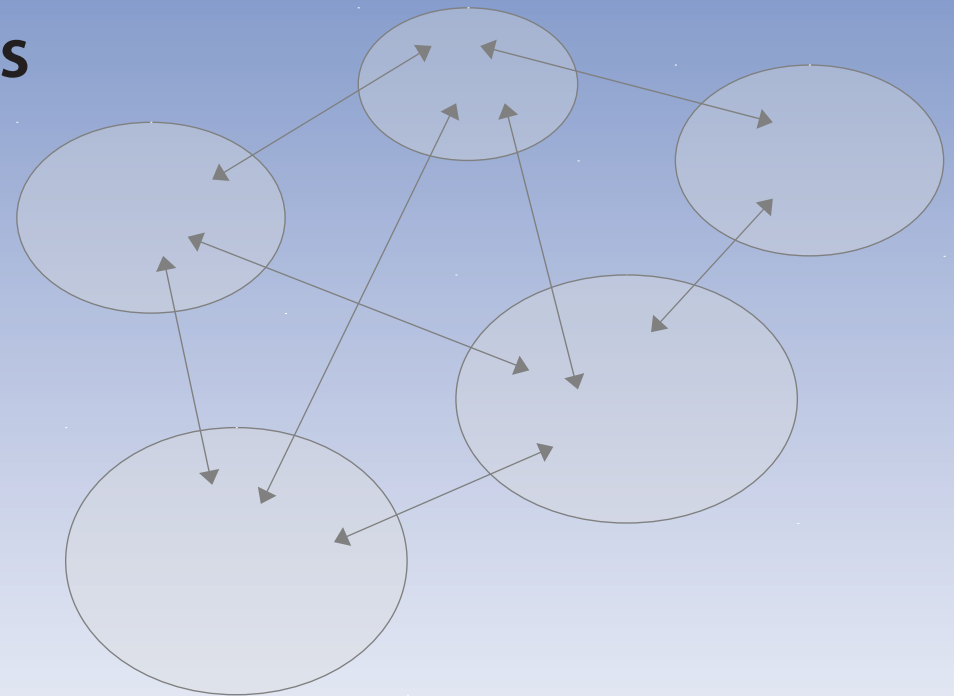
# Information/Assessment Phase

- Why collect data ?
- The Onion
- Methods
  - Interviews
  - Questionnaires
  - Observations
  - Document Review
- Using models
- Emphasis on the problem or the opportunity



# Take a Systems View

- Recognize the interrelationship of the parts and the importance of their interactions to create the whole.
- Stand at the edge to see patterns, connections and underlying structure.



# Feedback Phase

- Framing the Data
- Preparing for Resistance



# Feedback Phase: framing the Data

- Prepare with the needs of the client in mind.
- Do not suggest or imply blame.
- Think about possible client objections and resistance to the data.
- Identify opportunities to bring them to the surface and discuss them.



# Feedback Phase: framing the Data

- **Be willing to confront the tough issues.**
- **Acknowledge and confirm the positive data in the feedback.**
- **Remember, the data could be wrong or the interpretation could be off-base.**



# Feedback Phase:

- **Do not take it personally.**
- **Respond without arguing in a clear, even tone.**
- **Try rational responses first.**
- **If the resistance continues, state observations or feelings without blame, then be quiet.**

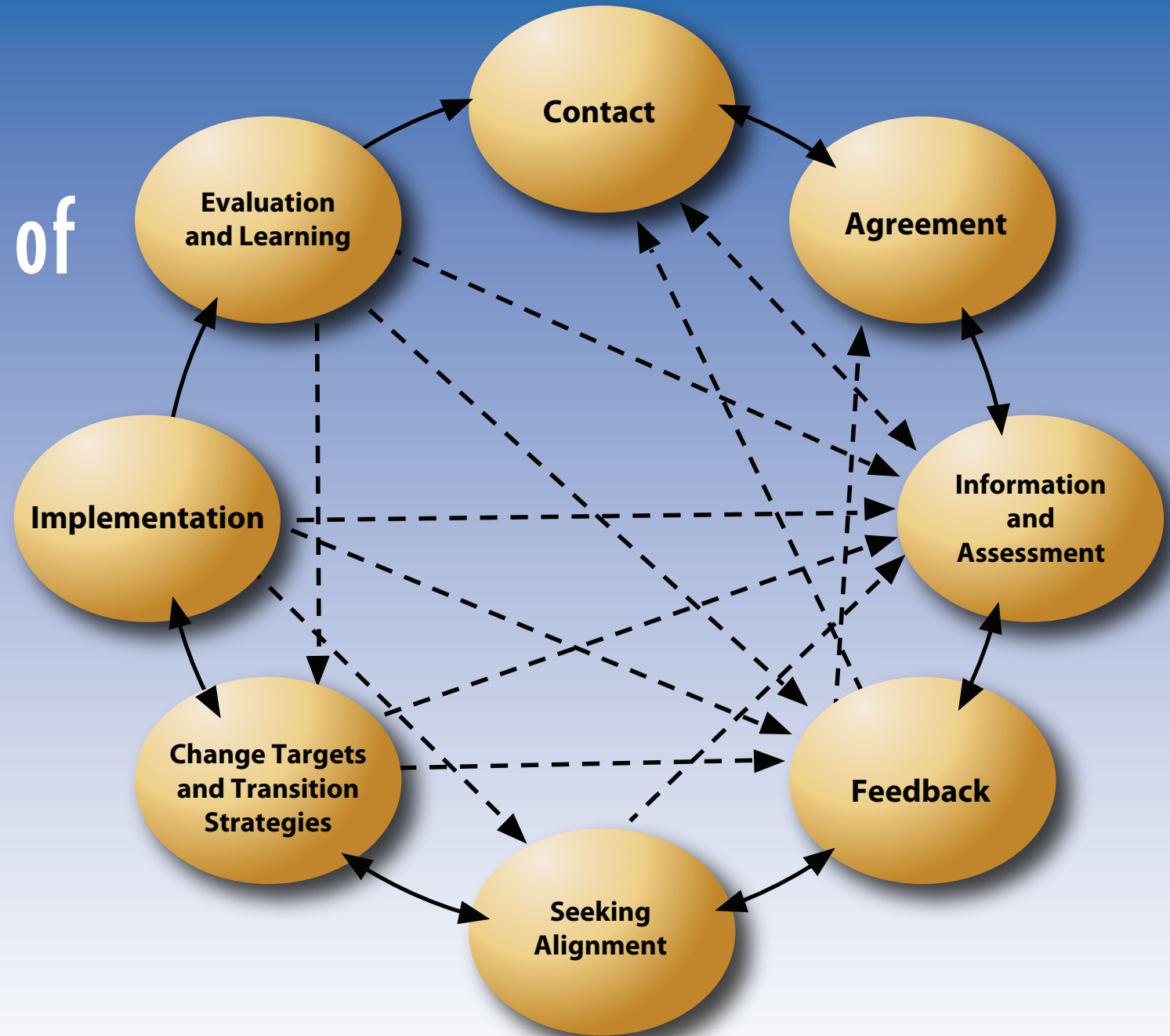


# Working with Resistance

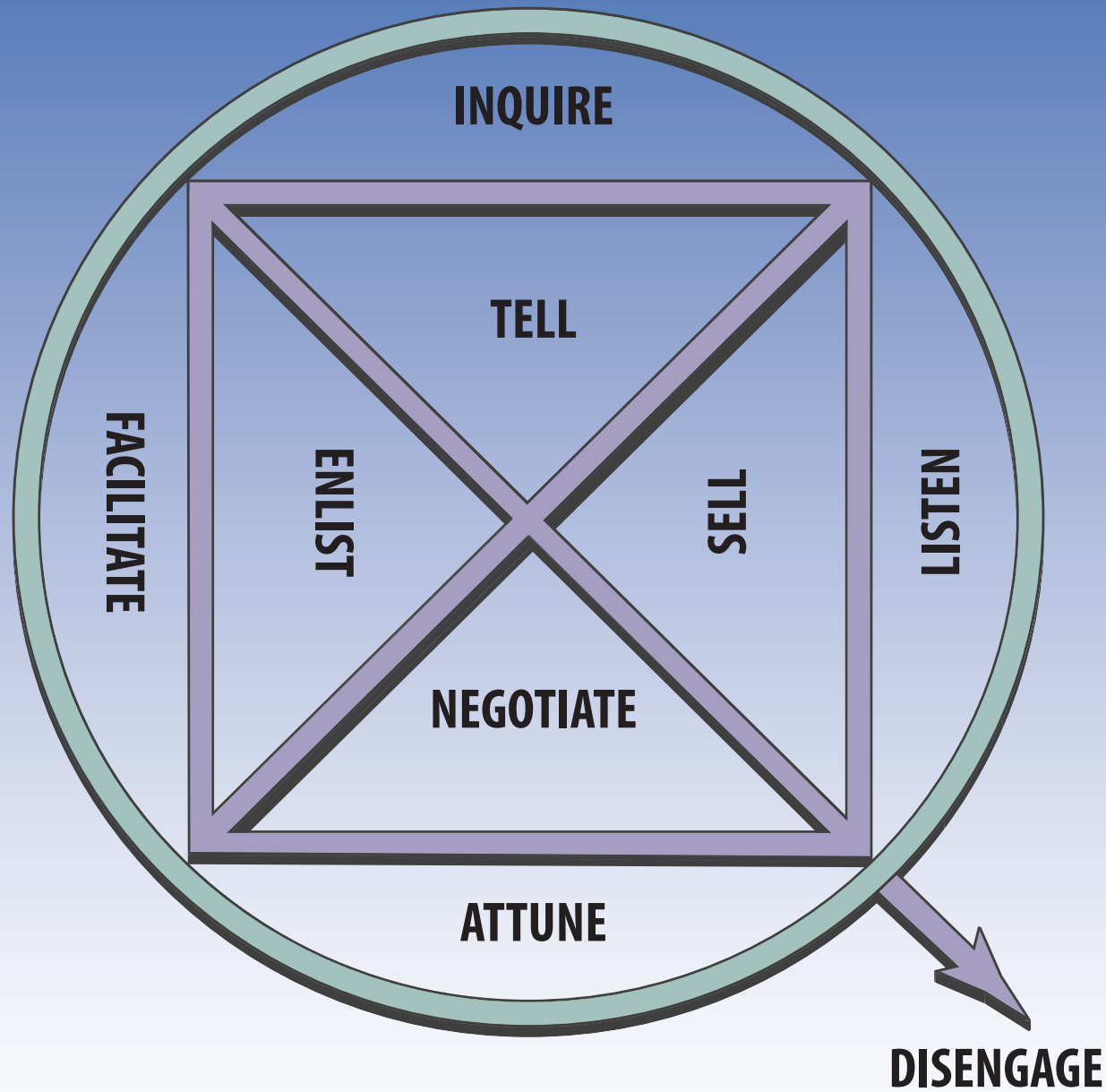
- Do not back down from the touchy issues in the data.
- Continue active listening until the other indicates he/she has been heard.
- Review the vision, goals, objectives , and agreements as appropriate.
- Repeat as needed.



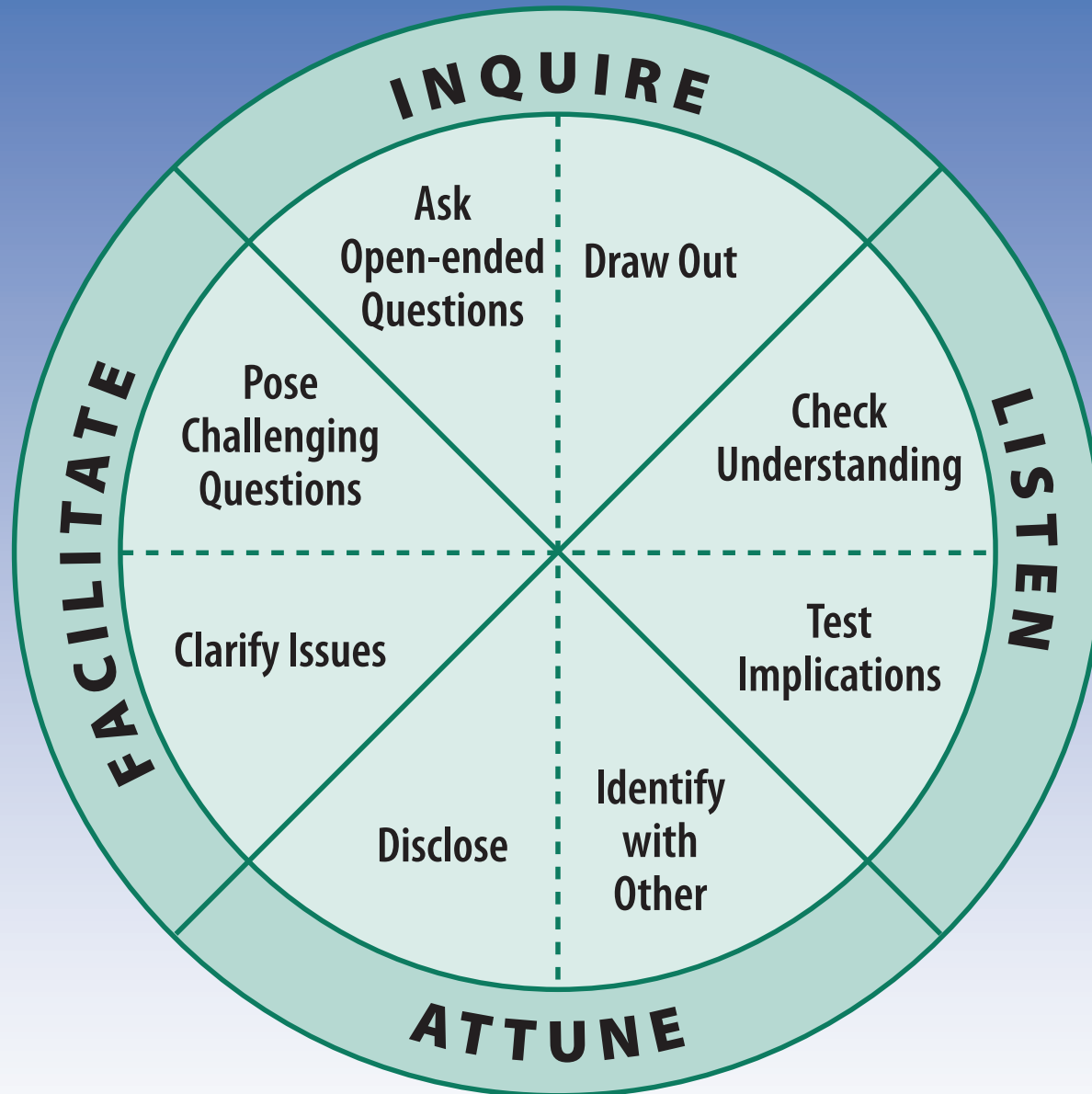
# The Process of Consulting



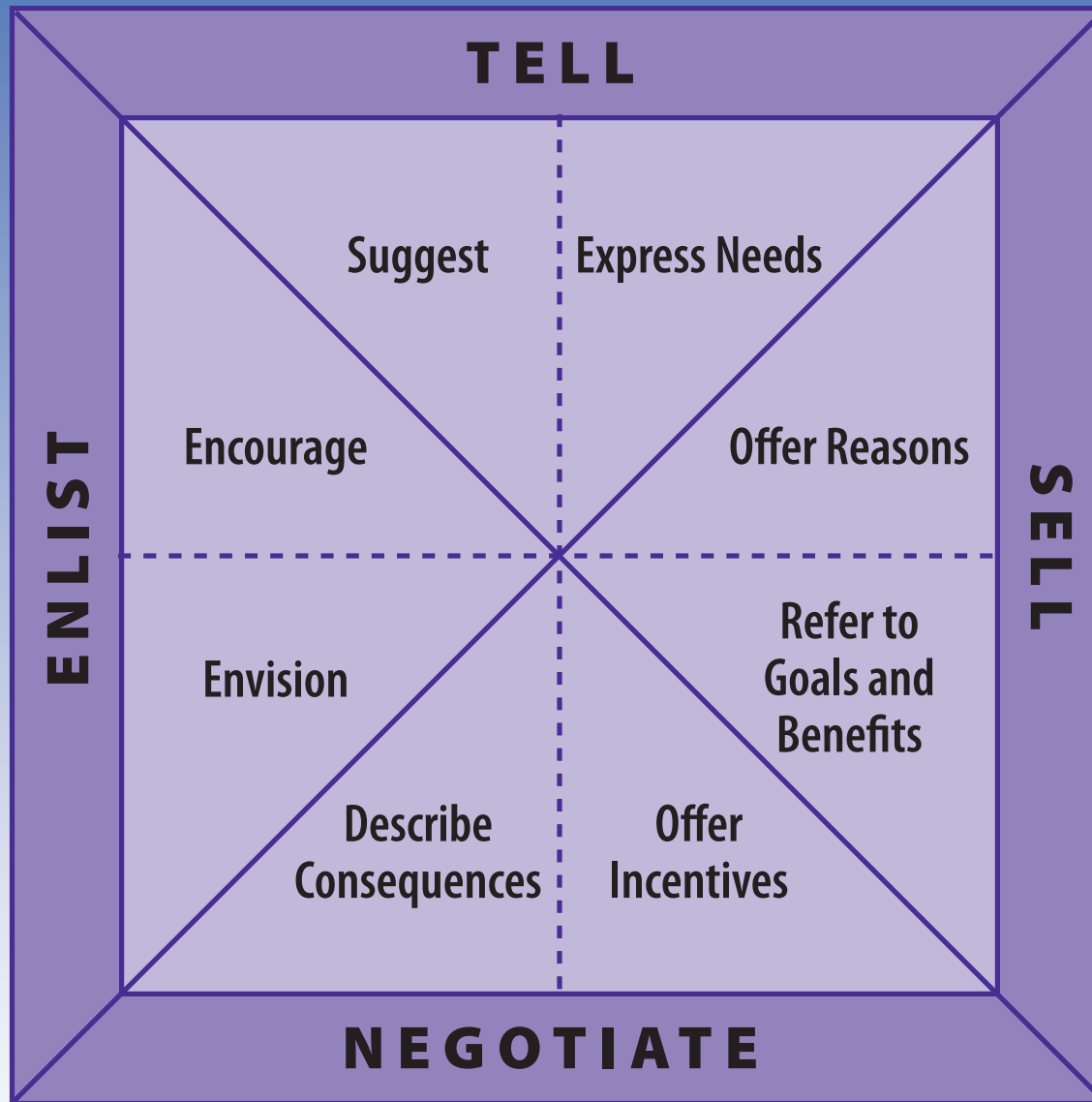
# Influence Tactics



# Receptive Influence Behaviors



# Expressive Influence Behaviors



# Self Management Issues for Internal Consultants

**Approval  
over  
Effectiveness**

**Belonging  
over  
Integrity**

**Moving On  
over  
Self Reflection**

**My Way  
over  
Our Way**

**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.



# Developing Your Best Self

*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)*

