PART 1

Consulting has many definitions. I often categorized it as an industry and occupation. Someone was a consultant or worked in consulting. Consulting is something someone lists on a tax form as an occupation; it is not a way of thinking or a way of engaging with others. It was something conducted by external people with a large organization. I’ve come to realize consulting is a broader range of skills and overall attitude in addressing issues. It is a set of skills that can be applied in multiple settings and environments.

Both Schein and Block presented frameworks that resonated with me. While I agree with Schein’s concept of process consultation and believe it is the preferred way to engage with a client, it seems utopic in some regards. From an external consulting perspective, it could add significant value and enhance the process for all parties involved, but I see potential restrictions that could dampen the end result.

Process consultation requires obtaining buy in from the client and making sure they are part of the process adds significant value to the experience and increases the likelihood that change would be implemented. “The consultant’s objective is to engage in successful actions that result in people or organizations managing themselves differently. Every time you give advice to someone who is in the position to make the choice, you are consulting (Block, p. 5).” I’m concerned with how this method works when the client does not know what they are looking for. When someone is unclear on the problem to be addressed, my intuition tells me that obtaining his or her buy in will be significantly more difficult. They could default to a doctor-patient relationship and mentally check out from the process. Based on this method, you also make an assumption that diagnostic information can be accurately gathered. With this said, I still believe process consultation is the best method to strive for, but I’m not sure if it is realistic to achieve.

A potential downfall for this methodology is the client refusing or staying indifferent on how to address the situation. If they want a consultant, then they need to provide input. Otherwise they are hiring a line manager to step in and fix the immediate issue without looking at the potential underlying problem (Block). “The client must learn to see the problem for herself or himself by sharing in the diagnostic process and be actively involved in generating a remedy (Schein, p. 16).”

The role of a consultant is to help, and “one can only help a human system to help itself” (Schein, p. 1). As a consultant, you cannot force an organization to change. Your role is to observe, make recommendations, and teach others. If the client does not act, you cannot control their decision.

The most critical contracting and entry issues from my point of view are defining the expectations and setting up the measurement systems to determine when the project is complete. Determining how effective it was in reaching the stated objectives can be a challenge if the initial baseline was not created. My experience has been when expectations are not clearly defined at the beginning, the project rarely meets the expectations of either party. This is magnified when the client is unsure of what they want and the consultant needs to help guide them through the discovery process.

While most of the text focused on external consulting, I consider myself an internal consultant. My primary area of focus is increasing the efficiencies within our organization. From this perspective, I was intrigued by Block’s presentation of the role of an internal consultant, especially since I find it a difficult place to be in at times.

Block’s description of contracting sounds great, but in my experience, they rarely happen when conducted internally. Internal consultants might have clear objectives to achieve, but that differs depending on the size of the organization. Within a small organization, people are required to play many roles.

I typically find myself in a position where a problem needs to be fixed, a new opportunity needs to be brought to market efficiently, or a process needs to be reviewed. That is the extent of the clarity given for the project. It stays very high level and is rarely the primary focus. I would welcome the opportunity to clarify the contract, but I have not seen that happen. From an external perspective, this seems to be the case more often. If there is a direct transfer of cash for a specific project, the planning and clarification is more professional. However, the more comfortable a client and external consultant get, there is a potential for a lower the level of clear objectives to be presented.

On internal projects there might be a clear expectation for the time frame, but it is not always realistic. Since the client could also be your boss, the psychological safety needed to push back on the date may not exist. The pressure of the timeline may force you to act in a way that is not in the best long-term interest of the organization. Other potential issues are that the circumstances allow for change to take place and you are not pushing against deep cultural norms or other potential hurdles.

As Block described triangular contracts and rectangular contracts, I realized that I often I feel like I am in more of an hourglass contact with multiple bosses on top, myself in the middle, and team members that I have to sell the idea to on the bottom. At any moment, it can be turned upside down and the relationships can change completely. The team members will bring up a complaint or concern that needs to be dealt with. They bring it my attention. I put thought into the real issues and formulate a plan to act. I then sell the idea to my bosses. They agree that work needs to be done. We flip the hourglass metaphorically, and then the real challenge begins. The team members are clients of sorts (Block). Part of this predicament is a personal struggle for me of staying on task and remaining focuses to the top priorities.

I’ve realized that clarifying the contract with my boss helps predict the success of the project. I cannot speak of what it is like to be an internal consultant in a large organization as I have not had that experience, but in a small environment, the roles each person plays can shift quickly and differ greatly depending on the project at hand.

PART 2

“Change comes in two varieties. At one level, we consult to create change in the line organization of a structural, policy, or procedural nature. The second kind of change is the end result that one person or many people in the line organization have learned something new (Block, p. 4).”

It is easy to recommend a plan of action. It is much more difficult to implement it and see the fruits of the work. “Part of what makes implementation difficult is that we often treat change as if it can be installed, managed, and engineered. Change cannot be installed and engineered, and so it always takes longer and is more difficult that we ever imagined (Block, p. 250).” My mind works like an engineer. I see a problem, come up with a solution, plan how to implement, and then expect to see the results soon after implementation. With people, this is an unrealistic expectation. Habits and deep-rooted processes will not change overnight. It is foolish for me to expect that to happen, yet it is how I have approached change management for the better part of my career. I skip over engagement and asking for input before announcing a change is coming. This type of action does not help facilitate trust and psychosocial safety within the group. Often when I speak up in a group meeting, I am announcing a new change that will directly impact their lives. This is harmful to the working relationship and can isolate my actions and potential effectiveness.

The potential alienation is magnified because my focus on a project can be short lived. Ironically I measure almost everything I do personally, but I fail to measure the impact of projects or changes I launch in an organization. Because they are not measured, I do not fully see the impact whether positive or negative. With a small organization that pivots quickly, the results are easily overlooked because the focus has shifted to the next hot topic of discussion and attention

“All we can really control is our way of working, our own behavior, our own strategies of involving clients and reducing their reluctance to operate… (Block, 2011, p. 47)” This is something I struggle with. I am caught in the middle of seeing what could be possible and wanting to step in to make that happen when in reality the client needs to be the one to make that step. My role is to recommend actions and work with others to make that happen.

I do a better job of doing the work than teaching others how to do. If I am asked to work on a project, I find it much easier to do the work myself rather than train others how to do the work so over the long term. I deny them an opportunity to gain a useful set of skills in the process. This is the primary area that I need to work on. I do not teach others how to do. I step in and do the job for them.

With this new understanding, it helps me better think through the work I do on a daily basis. I do consulting work, but mentally I labeled it as advising, helping, or simply working. I saw myself as working to increase efficiencies but not from a consulting perspective. I was merely doing the job I was hired to do and other things I thought would be beneficial to the organization. My title did not say consultant, but the actions I continually do are more in line with consulting than what I realized.

REFERENCES

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Schein, E. (1999). Process Consultation Revisited: Building the Helping Relationship. Reading, MA: Addison-Wesley.