Leadership Strategies
The Facilitation Company
practical. dynamic. interactive. The PDI Difference.

THE EFFECTIVE CONSULTANT

Get the techniques you need to successfully address client needs every time!

Why it works:	This course provides a structured framework for consulting, with foundation techniques and client handling strategies for each stage of the consulting process. Our well-known PDI (practical, dynamic and interactive) methodology is the basis for our highly effective course format including a highly interactive case study providing the opportunity to solve a real life client problem during the course.
Learn how to:	Manage client relationships effectively and achieve results for clients. Build critical skills to increase credibility, improve communication and manage expectations. Apply the right processes through a comprehensive framework for all stages of the consulting process, from defining client needs to running a project and reviewing results. ▪ Listen to client requests and ask key questions to help clients discover their real needs ▪ Gain client confidence and maintain a trusting relationship ▪ Communicate effectively with clients about status, issues and challenges ▪ Uncover the common barriers to team success and prevention strategies ▪ Develop and present convincing recommendations that address key client objectives ▪ Set appropriate expectations with client and manage them throughout the project life cycle Respond effectively to reasonable and unreasonable requests from clients
Ideal for:	Internal and external consultants and individuals whose roles require a consultative style.
Duration:	3 Days
Objectives:	▪ Define “consulting” and the distinguishing characteristics of an *Effective Consultant* ▪ Supply a structured framework for the consulting process ▪ Provide success strategies for each stage in the consulting process ▪ Provide key strategies for building and maintaining strong client relationships ▪ Provide an opportunity for participants to exercise their skills through structured exercises and feedback sessions

Agenda:	**Day One** Opening What is Consulting? The Relationship Management Process Defining the Need – Questioning **Exercise #1 - Interviewing the Sponsor** Understanding Your Client – DISC Review and Close	**Day Two** Review Applying DISC Defining the Need – Proposing Defining the Need - Solution Processes **Exercise #2 – Proposing** Preparing to Execute **Exercise #3 - The Scoping Meeting** Review and Close	**Day Three** Review Building Consensus Executing the Project **Exercise #4 - Data Gathering** **Exercise #5 – Recommendations** Reviewing and Assessing Action Planning Review and Close

Why This Course?

We have all seen them: exceptionally strong technical consultants whom we wouldn't dare put in front of clients. Why? In some cases, they were just too young and too inexperienced and would not engender the client's confidence. In other cases, they were too brash, too arrogant, and too condescending to clients. And often, they couldn't speak the client's language nor think in terms of the client's needs.

In today's fast-paced, highly specialized business environment, it is more important than ever for information technology professionals to have strong client relationship management skills. However, all too often technical experts are well versed in the latest development utilities and web technologies, but lack the soft-skills needed to work successfully with clients. For skilled technicians to become effective consultants, they need an entirely different set of competencies. They must be able to:

- Listen to client requests and ask those key questions that helps clients discover their real needs
- Gain the client's confidence and maintain a trusting relationship
- Communicate effectively with clients about status, issues and challenges
- Develop and present convincing recommendations that address the key objectives of clients
- Set appropriate expectations with clients and manage those expectations through out the project life cycle
- Respond effectively to reasonable and unreasonable requests from clients

Overview

The Effective Consultant was designed to provide a classroom experience for cultivating these skills and much more. The course is designed to help technically proficient consultants understand and value the importance of client relationship management. We then provide them a framework for the relationship management process and supply techniques and best practices for success.

The standard agenda for the three-day course is shown above. In the sections that follow, we provide a more detailed description of key components of the course, as well as a full outline of the course workbook.

The Consulting Process

The Effective Consultant utilizes a four-stage model for the consulting process: define the need, prepare to execute, execute the project and review and assess. The course provides best practices for successfully executing each of the stages. Throughout each stage, participants also learn and practice the appropriate client relationship management strategies.

Establishing a Consulting Mindset

The goal of the first segment of the course is to have every participant understand that the primary focus of an effective consultant is NOT "doing a good job." Instead, an effective consultant's primary focus is on ensuring that clients are satisfied that their needs are met. For, while a "contractor" is focused on the "job," an effective consultant is focused first on the client, the client's needs, and the client's satisfaction. This difference in focus requires a consultant to have many more skills beyond the ability to do the job.

Some professionals who attend this class already have this consulting mindset. We find, however, that for many participants, the understanding of consulting as a client-focused activity is a different, and sometimes shocking perspective. Through a series of three interactive activities, participants are engaged in understanding the differences between a contractor and a consultant, the role of a project manager versus a relationship manager, and the key stages in relationship management.

Teamwork

Consultants often find themselves as a part of team working to achieve the client's objective. Therefore, in this course, we utilize teams from beginning to end. Through out the instructional modules of the course, we have short two-to-four minute in-class team exercises that forces participants to exercise team skills under time pressure. In addition, the 20-45 minute breakout exercises surrounding the case study (described below) provide more extensive team interaction. Teams typically change each day to allow participants to network and get a fuller experience of how composition changes a teams dynamic.

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The Case Study Exercises

Prospective tennis players can read many books on tennis, and get an understanding for how the different strokes work. However, they really don't improve until they go out and hit the ball. In the same way, while some participant learning does occur during the interactive instructional sessions, we find that most of the "real learning" transpires when the participants get a chance to exercise their skills. Participants in The Effective Consultant exercise their skills in a mock case study in which a company that previously had been successful, is encountering significant difficulties due apparently to recent changes. Below we describe the first exercise in detail, followed by a summary of each of the other exercises.

Participants are divided into three consulting firm (teams). The case study begins with a call from the head of a company, requesting that each consulting firm comes in to discuss his current problems. The instructional components prior to this first exercise provide participants with a structured process for interviewing clients, probing for needs, understanding benefits, defining constraints, etc. Before the meeting, the teams are also given background information on the company.

Each team interviews the head of the company (the instructor) with the other teams out of the room. The interviews last a maximum of twelve minutes and are typically tape- recorded. Following the interviews, the teams are given a ten question review test to determine if they were able to gather the critical information during the interview. In addition, the instructor plays back segments of the tape-recorded interviews and stops in mid-interview to ask all participants, "What is the next question that the team should ask?" These feedback sessions provide participants with a clear picture for the key questions to be asked to define a client need. They also see how valuable information can be "left on the table" because key questions were not asked. Following the exercise, the teams are given the key information that they needed to obtain. This pattern of exercise-feedback-hand-out follows for each of the exercises.

There are five exercises in total designed to take the participants through the entire consulting process. The case study exercises are summarized below:

Exercise #1 Interviewing – Participants utilize interviewing strategies to understand the current situation, problems, benefits, decision process, solution process and constraints facing the company.

Exercise #2 Proposing – Participants transform key components gained during the interviewing phase to develop a task plan, business area diagram and deliverables list for the engagement.

Exercise #3 Scoping Meeting – Participants develop segments of the detailed plan for executing the project.

Exercise #4 Data Gathering – Representatives from each team use a subset of group facilitation techniques to gather critical information from "company members" about the problems and potential solutions.

Exercise #5 Recommendations – Participants develop and present findings, conclusions, recommendations and benefits to address the company's needs.

Many of our clients find it helpful to customize the case study to provide maximum opportunity for their participants to transfer the skills to their work place. Due to the modular way in which the course is designed, customizing a case study can require as little as one or two days of effort.

DISC Communication Styles

We utilize the DISC model to help participants understand communication styles. Prior to the class, participants complete the 24-item questionnaire, typically through the Web. Early in the class, participants learn about the four standard communication styles and how the different styles appear in consulting engagements. They learn about how the needs of a someone who is predominately a C-style communicator differ significantly from the communication needs of an I-style. They learn to recognize the styles and methods for adjusting to communicate more effectively with each of the styles. When the participants receive their 24-page report, they are typically well-educated in the model and how to effectively apply the information they read about themselves. An in-class exercise further reinforces techniques participants can personally apply to communicate more effectively with other styles they find difficult.

Templates and Samples

The Effective Consultant includes numerous samples and templates for participants to use going forward:

- Communication styles
- Communications plan
- Data gathering session
- Delineation
- Engagement close letter
- Keys to effective note taking
- Managing scope
- Performance objectives
- Probing problem statements and evaluation statements
- Project initiation memo
- Project organization
- Project sponsor kick-off remarks
- Project status meeting
- Project team norms
- Project team selection
- Recommendations format
- Recovering from a faux-pas
- Relationship management goals
- Resistance resolution
- Reviewing performance
- Risk assessment
- Sample facilitation guide
- Sample proposals: full proposal, letter proposal, statement of work
- Sample solution processes: strategic planning, project planning, issue resolution, management review, basic improvement, process re-engineering, procedure design, information needs analysis
- Six interviewing questions
- Strengths and Weaknesses

The Instructional Method

The course employs powerful interactive learning concepts to keep the attendees constantly feeding back what they are learning:

- Instead of using lecture as the standard teaching mode, the course instructor engages participants in explaining highlighted points; the instructor then expounds as necessary to reinforce comprehension.
- Our instructors are themselves consultants, not trainers, who have superb instructional skills. They personalize the material by sharing samples of their own experience at relevant points.
- As techniques are reviewed, the instructor uses "backward build-up"; that is, the instructor constantly asks the participants questions about material previously covered in order to build up comprehension. For example, when covering information on scooping a project, the facilitator randomly asks participants to respond to questions about interviewing and other previous modules.
- Team quizzes requiring rapid decision and action are used to vary the pace and increase comprehension during lull times (e.g., early afternoon)

The cumulative result of employing these techniques is the creation of a learning environment that encourages participation and requires constant attentiveness (participants never know when they will be called on). Past participants have commented that the pace is fast, fun and intense.

Course Workbook Outline

I. Getting Started		II. What is Consulting?	
1.1	Course Objectives	2.1	What is Consulting?
1.2	The Critical Issues	2.2	What Value do Consultants Provide?
1.3	The Leadership Strategies Model	2.3	External vs. Internal Consultants
1.4	Agenda	2.4	How does Consulting Differ from Having a Regular Job?
1.5	Ground Rules	2.5	What is an Effective Consultant?
1.6	Introductions		

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III. The Relationship Management Process

3.1 What is Relationship Management?
3.2 How does Relationship Management Differ from Project Management?
3.3 Relationship Management Stages
3.4 Establishing/Assessing Goals
3.5 Gaining the Client's Confidence
3.6 The Four Cs of Trust
3.7 Maintaining the Client's Confidence
3.8 Recovering from Mistakes

IV. Defining the Need: Interviewing

4.1 The Scenario
4.2 Why are Objectives Important?
4.3 The Project Sponsor Interview
4.4 "SSR-ing" Problem Statements
4.5 Funneling Evaluation Statements
4.6 Keys to Effective Note Taking

V. Understanding Your Client

5.1 Typical Communication Problems
5.2 Understanding Communication Styles
5.3 A Sample Scenario
5.4 Identifying the Styles of Others
5.5 Assigning the Project Team
5.6 DISC Profiles
5.7 Your Personal DISC Profile
5.8 Adapting Your Style
5.9 Success Strategies for Applying DISC

VI. Defining the Need: Solution Processes

6.1 Problems and Solution Processes
6.2 Overview of Solution Processes
6.3 Identifying Solution Processes
6.4 The Drivers Model
6.5 Solution Processes and Sample Deliverables

VII. Defining the Need: Proposing

7.1 Types of Proposals
7.2 Steps for Proposal Development
7.3 Developing the Proposal with the Client
7.4 Defining Roles
7.5 Scoping the Engagement
7.6 Sample Business Area Diagram
7.7 Sample Deliverable List
7.8 Sample Task List
7.9 Sample Proposal: Statement of Work
7.10 Sample Proposal: Letter Proposal
7.11 Sample Proposal: Full Proposal

VIII. Preparing to Execute

8.1 Prepare for the Scoping Session
8.2 Perform a Risk Assessment
8.3 Establish Performance Objectives
8.4 Hold the Project Scoping Session
8.5 Maximizing Involvement
8.6 Why is Involvement Important?
8.7 Sample Project Organization
8.8 Selecting the Project Team
8.9 Project Team Norms
8.10 Sample Project Initiation Memo
8.11 Outline of Project Sponsor's Kick-off Remarks
8.12 Communications Plan

IX. Building Consensus

9.1 The Mountains and Beaches Model
9.2 Why Do People Disagree?
9.3 Suppose It's Level 3?
9.4 When Do You Take Control?
9.5 Delineation
9.6 Strengths and Weaknesses
9.7 Merge
9.8 Converge
9.9 When to Move On

X. Executing the Project

10.1 Monitoring the Work Effort
10.2 Running Effective Meetings
10.3 Management Updates
10.4 Project Status Meetings
10.5 Data Gathering Sessions
10.6 Managing Scope
10.7 Managing Change
10.8 Managing Change Resistance
10.9 Managing Issues
10.10 Developing Recommendations

XI. Reviewing and Assessing

11.1 Review Performance
11.2 Establish Recommendations for Improvement
11.3 Celebrate the Victory
11.4 Send an Engagement Close Letter

XII. Action Planning

12.1 Identifying Your JEWELS
12.2 Planning Change

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