COURSE DESCRIPTION

The Facilitative Consultant

Leadership Strategies

Learn vital techniques to successfully address client needs every time!

Why it Works

This course provides a structured framework for consulting, with foundational techniques and client handling strategies for each stage of the consulting process. Our PDI (Practical, Dynamic and Interactive) methodology is the basis for our highly effective course format, including an interactive case study allowing you the opportunity to solve a real-life client problem during the course.

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

Learn How To

Build critical skills to increase credibility, improve communication and manage client 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 learn prevention strategies
- Develop and present convincing recommendations that address key client objectives
- Set appropriate expectations with clients and manage them throughout the project life cycle
- Respond effectively to reasonable and unreasonable requests from clients

Ideal For

- **Internal and external consultants**
- **Individuals whose roles require a consultative style**

Duration

Three Days

Objectives

- Define “consulting” and the distingushing characteristics of a Facilitative 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 manitaining strong client relationships
- Provide an opportunity for participants to exercise their skills through structured exercises and feedback

AGENDA

Day 1

- Opening
- What is Consulting?
- The RM Process
- Defining the Need – Questioning
- LUNCH
- **Exercise #1: Interviewing the Sponsor**
- Understanding Your Client – DISC
- Review and Close

Day 2

- Review
- Applying DISC
- Defining the Need – Proposing
- Defining the Need – Solution Processes
- LUNCH
- **Exercise #2: Proposing**
- Preparing to Execute
- **Exercise #3: The Scoping Meeting**
- Review and Close

Day 3

- Review
- Building Consensus
- Executing the Project
- **Exercise #4: Data Gathering**
- Lunch
- **Exercise #5: Recommendations**
- Reviewing & Assessing
- Action Planning
- Review & 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 condence. 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 to possess 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 Facilitative Consultants, they need an entirely different set of competencies. They must be able to:

- Listen to client requests and ask those key questions that help 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 throughout the project life cycle
- Respond effectively to reasonable and unreasonable requests from clients

The Consulting Process

The Facilitative 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 a Facilitative Consultant is NOT "doing a good job." Instead, a Facilitative 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," a Facilitative 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 a team working to achieve the client's objective. Therefore, in this course, we utilize teams from beginning to end. Throughout the instructional modules of the course, we have short, two to four minute, in-class team exercises that force participants to exercise team skills under time pressure. In addition, the 20-45 minute breakout exercises surrounding the case study 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 team's dynamic.

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 online. 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 an individual who is predominately a C-style communicator differ signicantly 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.