



## September 2007

### **The Basic Skills and Roles of Today's Consultants**

**By Bev Scott**

Consulting is big business, and those who ply their trade can range from aeronautical engineers to zoologists. So how and when does an expert decide to become a consultant and what should she consider?

There are two approaches to consulting. The *expert* approach is used when the consultant brings a specific technical expertise and knowledge to solve the client's problem by using some kind of data collection and analysis and then recommending an expert answer. The *process approach* is used by consultants who rely more on tending to the needs of the client, not only the problem he brings but also his emotional, nonverbal concerns. That consultant will spend more time understanding the problem and identifying potential solutions. She needs to be able to transfer her knowledge and skill to both the client and his organization.

My definition of a consultant (internal or external, expert or process oriented) is someone who uses her expertise, influence, and personal skills to facilitate a client-requested change without formal authority to implement the recommended action.

Expertise is whatever specific knowledge someone has, such technical expertise as accounting, information technology, or marketing skills; or organizational expertise, such as change management, organizational development, training, group dynamics, and facilitation.

Influencing change involves both the client and the members of the organization. It requires leadership commitment and building trusting relationships. It includes recognizing and being perceptive about the client's feelings and emotions, as well as responding appropriately and preparing senior leadership to hear the truth. When you are giving bad news, influence skills can help your client hear it, accept it, and act upon it.

Consultants need to listen, acknowledge that they've heard what the client says, understand the problem, and serve as a trusted advisor. This doesn't necessarily mean that consultants must agree with the client. It is also essential to maintain confidentiality and resolve or address ethical issues with integrity. This will more likely be the case when working with senior leaders and having access to a lot of personal information. Consultants also must be able to manage their own personal biases and defensiveness.

Consultants must help clients trust the process; plan with your client in a collaborative way; explain the pros and cons; build realistic expectations; clarify outcomes by outlining such scenarios as “if you take this option this is likely to happen;” facilitate the decision-making process when working with a group; and manage the project.

It is important to recognize that client-requested change is something the client needs or wants, and a consultant’s personal agenda and needs cannot get in the way. For example, if a consultant gets excited about the process, such as analyzing a marketing strategy, she may create a huge marketing plan when the client only wanted an answer to one small product positioning.

When a client requests a change, the consultant needs to be able to perform during the period of transition and chaos. Because it is a client-requested change, consultants need to be able to collaborate. It is also vital to recognize that in an organization, one change often affects other things.

In our culture, we’re used to getting things done by delegating responsibility. Consultants have to be able to take a leadership role and initiate action while being assertive in a collaborative process. Communication needs to be delivered in a way that enables others to express themselves. Clients may make decisions that consultants’ radically disagree with, but consultants need to be able to accept that the buck doesn’t stop with them. Consultants have both accountability and responsibility for their recommendations and their role with the client, but they’re not responsible for the decision itself.

Finally, consultants need to be able to manage their own business, including marketing, accounting, setting up the legal entity, buying insurance, and gaining the financial capital needed for starting the company.

Traditionally, consulting has consisted of the two roles we’ve been describing, but there are several new roles emerging:

- The **performance consultant** partners with a client, but focuses more on the system. She looks at the whole organization or a working group within the organization, and then makes suggestions in partnership with the client on how to improve performance. In addition, she often partners with client to put the recommendations in place.
- A **change leader** is hired to understand and change the process. She will take a leadership role because of her expertise in aligning people with a new direction or strategy. She not only brings employees on board for whatever change is required, but pays attention to the emotional and energetic qualities of the organization.
- A **trusted advisor** is someone who serves as a sounding board and confidant. There is currently a big movement in coaching—a role that is often similar to the role of a trusted advisor. The coach serves as someone to whom a client can present his dilemmas. She can listen and give suggestions, but may not give recommendations.

*Bev Scott has served as a consultant to organizations for more than 30 years. She is the author of Consulting on the Inside: An Internal Consultant’s Guide to Living and Working Inside Organizations. She also teaches organization psychology at John F. Kennedy University.*