

Internal Consultancy Skills

A wide variety of people are finding that they need consultancy skills to carry out their enhanced roles. Typical groups include HR staff, change agents, internal auditors, internal consultants, IT consultants and facilitators.

Our workshops in this field are all designed to a client's particular requirements. We all have immense practical experience as internal consultants and are familiar with the particular issues that internal consultants face and experience in dealing with them.

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- **The Consultancy Process**
The natural stages that effective consultancy work goes through and how to make it work.
- **Consulting skills**
The consultancy and interpersonal skills to handle clients, stakeholders, and colleagues.
- **Managing the Project**
Approaches and techniques for organising, planning and progressing consultancy projects.
- **One topic**
We build the workshops around the problems delegates are consulting on e.g. human resources, managing change, strategy development, quality of service, etc.

Clients include COI, Immigrations Service, and HMC&E.

Internal Consultancy Skills Case Study

For four years we supported a central government department with the introduction of their "Professionalism through Quality" initiative.

The proposal that we developed was to run training workshops for members of change teams based at their thirty local operating sites. The teams were to start and lead local initiatives. We designed a workshop that included training in both quality of service approaches and consultancy skills for change agents.

It was highly successful and by the end of that period every site in the UK had an active team working on identifying local customer improvements, guided by a national steering group which also sponsored UK-wide improvements.

And the Outcome

All the PTQ teams were able to return to their sites and develop a local initiative. These led to numerous improvements in working practices and procedures to improve customer service.

Consultancy Skills Course Pen Pictures

Consulting Skills

A workshop to train participants in the consultancy skills needed to successfully work with clients. It covers:

- Operating as a consultant - what clients want, consultancy phases, building a relationship
- Entry & Contracting - managing initial contacts, key skills and behaviours, client & consultant roles
- Diagnosis - research and analysis, stakeholder & clients needs, establishing the issues
- Intervention - different intervention styles, scoping the project, developing proposals
- Withdrawal & the future role

Includes key interpersonal skills of listening, questioning, & influencing.

Facilitation Skills

A workshop to train participants in the key interpersonal skills of facilitation.

It covers:

- The Facilitation Process & role;
- Establishing & building the relationship;
- Facilitating meetings - how groups develop and behave;
- Intervention Strategies - what to use; when & how?
- Key interpersonal skills - observing, listening, questioning, challenging, and influencing.

A self-assessment helps participants to identify their own strengths & weaknesses.

Research, Analysis & Problem Solving

Aimed at all who wish to become better acquainted with the approaches, tools, and techniques of Structured Problem Solving. It covers:-

- Scoping the Problem;
- Collecting the information required - hard and soft information
- Establishing the "real" problem - the root causes.
- Tools & Techniques - Brainstorming, Mindmaps, Fishbone analysis, Process Mapping
- Finding Solutions - Tools for creativity
- Implementing - Roadblocks and how to remove them. Plans, Pilots & Implementation.

Internal Consultancy Skills Workshops

Overview

These workshops are designed for people such as HR staff, change agents, internal auditors, internal consultants, IT consultants and facilitators, who are finding that they need consultancy skills to carry out their enhanced roles.

All of our workshops are designed to suit the particular needs of the client. Generally, they span two or three days and are built from various elements, according to the clients needs. The following is an example programme.

These are then supplemented with training in the particular issues that people will be consulting on; for example management of change, strategy development, programme management, or quality of service.

The workshop includes practical work on delegates real assignments and work where delegates can assess their own natural consulting style and areas of development. See also "Tips for Consultancy" for more about our approach to consultancy in practice.

Example Programme

Aims & Objectives

To provide participants with the Internal Consultancy key principles, approaches and skills.

By the end of the workshop participants should be able to understand and apply the consultancy process, manage the requirements and expectation of their clients more effectively, and organise and facilitate consultancy projects.

Day 1

0930 Introduction and Group Exercise:

- What factors help and hinder you in your consultancy work?

1045 The Consultancy Process

- The natural stages that effective consultancy work goes through - entry, contracting, diagnosis, intervention, withdrawal.
- The entry stage - appraising the situation whilst building a relationship with the client and starting to influence them.

1330 Managing Clients and Their Expectations

- What do clients really want? How do they feel?
- Building confidence and trust.
- Managing the entry stage

1500 The Interpersonal Skills of Consulting

- Interpersonal skills of interviewing, influencing and negotiating
- Learning to observe, listen, and read situations.
- Facilitation techniques and skills

1700 Close

Day 2

0930 Managing the Project

- Introduction to project management approaches
- Setting up and organising a project through a simple project scoping plan.
- Planning and controlling the project - the key project planning and control techniques
- Group work scoping delegates real projects.

1330 The Practice of Consulting

- The practice of consulting - managing the process of initial survey, draft proposal,
- Developing proposals and findings,
- Presenting proposals,
- Designing and organising effective workshops and meetings
- Research and data collection, analysis, and problem solving

1500 Change Management

- Managing change - the issues and the approaches commonly used.

1600 Consultancy Self- Development

- Delegates assess their own strengths and weaknesses, and areas of development

1700 Close.

Tips for Internal Consultancy

From our considerable experience of internal consultancy work, we have listed below a few of what we feel are the key tips for anyone working in this field. We hope that you find them helpful.

Fred Sherwin

1. Success in consultancy is as much about managing relationships as content

Of course, for some "expert" assignments the content is crucial. However, for most it is the building and maintaining of relationships - particularly between consultant and client - that leads to successful assignments.

2. What all clients want

Each client is different - in the way they see your role, in the level of involvement they wish, and in the sort of results they seek. With experience, one learns to read the situation, adapt, and establish an agreed working relationship. However, the following are common to virtually all clients:

- **no unexpected surprises**
More anything else, this needs to be the touchstone that governs any consultancy assignment. If anything is going amiss, clients want to know in case it impacts on something else they or others are doing.
- **a success**
It's easy to forget this at times, but almost all clients want a success - it reflects on them just as much as it reflects on you. But how does your client define success?
- **clarity and flexibility**
They want to be clear what your role is and what you are planning to do, but also expect you to be flexible and able to adapt to changed circumstances. Thus, work to define your role and then stay in it, but be prepared to flex and adapt when needed.
- **your interest**
They expect you to be interested in their work, their ideas, their people, and the issues they face.

3. Have a consultancy process

You need to have in mind a consultancy process that you expect to progress through, as a game-plan for both yourself and the client. Not just because it is tidy but because it helps you to manage the client relationship. The one that we use envisages an assignment as progressing through five broad stages:

- **Entry** - where one builds the initial relationship with the client and carries out an initial survey or scoping to establish what the assignment is about, what it should aim to achieve, the likely time and effort required, and possible risks and difficulties.
- **Contracting** - where one agrees with the client what the task is, what the consultant's role

is, and how it should be tackled.

- **Diagnosis** - gathering information and ideas to arrive at options and a plan of action
- **Intervention** - taking actions to deliver the results, be it a report or organising the changes.
- **Withdrawal** - ensuring that the client organisation can carry on without you and leaving the ground clear for your future involvement.

This is a general model and you may find it best to amend it to something that suits your own particular work and style. You may need to customise a process for a particular assignment.

4. On the practice of consulting

- **the "golden rule" - start with an initial survey or scoping**
The initial meeting between client and consultant is crucial. If the client is in a rush or under pressure, there is a danger that you might be agreeing to a brief, resources and timescales without knowing very much at all about the issues and difficulties. An initial survey followed by a brief proposal and a further meeting, gives both you and the client a much better basis for moving forward.
- **If you are unsure or wish to change the brief - go back to the client**
During the assignment, if you become at all unsure about the brief or feel that it needs to be changed, go back to the client and discuss it. If you feel that way then the likelihood is that the client feels the same. If things are deviating from what the client expects - tell them. What they want most of all is no unexpected surprises.
- **Be organised**
If you are acting as a consultant, the client expects that you will be professional. To maintain that image, you do need to be well organised. If you start to make errors or miss meetings, then that image will be eroded. Plan and project manage your assignment well.
- **Managing expectations is key**
When assignments do start to flounder, in most cases it is because a mis-match develops between the clients expectations and the consultants plans and activities. This is why in many assignments, regular stock-takes, perhaps by note or phone, are needed.
- **Get connected and stay connected**
If you want to get and retain the client's confidence and respect, you need to convince them that you are connected - that you understand their world. Some key pointers are:
 - get to know the client's business so that you understand their pressures, concerns and priorities;
 - be aware of other projects going on so that you have a similar context to them;
 - try to keep connected with the daily happenings in the team e.g. concerns and priorities.
- **Consciously build your own reputation with the client**
The more respect that the client has for you and your work, the more impact you will have and the more they will ask you to input. It also means that at the end you can withdraw to return.

5. Learning to Read Situations

If managing relationships is the key to success in consulting, then it is the behaviour and interpersonal skills of the consultant that make that happen. All really skilled consultants have excellent interpersonal skills. They need them in order to:

- read situations
- build empathy with clients and others
- gain the trust and respect of those they are working with
- facilitate meetings
- influence others
- tailor communications to suit the audience
- predict peoples' reactions
- avoid or get out of difficult situations

These skills - listening, observing, questioning, challenging, influencing, negotiating - are fundamental to good consulting and can all be developed through training and experience. They form a key element of our consultancy skills training.

6. About you as a consultant

- **Where is your consulting "comfort zone"?**
Your comfort zone is the style that you are personally most comfortable with. For some it is "process consulting, for others "facilitation", for yet others it is "expert advice". We can all flex and operate outside of this comfort zone - but only within limits. What is your comfort zone and what are the limits?
- **What are your strengths and weaknesses?**
Planning, organising, interpersonal skills, creativity? Identify them and then major on your strengths and start to develop to remedy your weaknesses.
- **What is your organisational role?**
Internal consultants often have a dual role. They consult but they are part of a group with functional responsibilities which carry a monitoring accountability e.g. internal audit. Such dual roles can make uneasy bedfellows and confuse both you and the client.

7. Consultancy Ethics

And finally - consultancy can be a seductive role. One can be in a situation of having influence and knowledge far beyond what people in the client's team have. Some consultants can be tempted to misuse this. But as a consultant you do need a set of ethics to work to.

If a client invites you into their operation to help them, they have the right to expect that you:

- respect the client's knowledge
- be careful not to be over-prescriptive or judgemental
- respect confidentiality
- avoid becoming involved in the internal politics
- remain in the role that the client expects you to fulfil