7-PHASE CONSULTING MODEL FOR CHANGE PROJECTS

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Sally left the team meeting and went back to her cubicle. She sat at her desk, thinking about quitting. Another meeting with more work put on her plate. No recognition for all she had done. “It’s time,” she thought. She’d had enough of her boss and the company. Too many projects, unreasonable deadlines, lack of resources, and so-called teammates who weren’t carrying their load had taken their toll. Things had to be better elsewhere. She went home that night and started looking for a new job.

Sound familiar? According to “How Often Do People Change Jobs?” an article by Alison Doyle published in The Balance, between 69 percent and 87 percent of people between the ages of 25 and 48 have an average length of employment of fewer than five years.

Further, Tom Gimbel, writing in Fortune, says people leave their companies for three primary reasons: their boss, more money, or lack of enjoyment of the work. Most of us have experienced an overbearing boss, a stifling environment, or a job that is less than fulfilling. Many feel helpless in such situations.

However, there are people whose profession it is to “fix” these conditions. They are change agents, and the work they do is organization development (OD).

This issue of TD at Work can help OD consultants and others learn about:

- the knowledge, skills, and expertise necessary to become a change agent and how to acquire that expertise
- a seven-phase consulting process and the issues involved in each phase
- how to establish planning and implementation teams, project goals, and solutions to achieve those goals.

BECOMING A CHANGE AGENT

Because there are so many moving parts in an organization, becoming skilled and knowledgeable enough to unfix it from its current situation, guide it through a transformation, and refix it to a new

### CHANGE AGENT COMPETENCIES

Skills in these areas are vital to the success of change agents and the organizations that engage them:

- **Appreciative Inquiry:** The search for the best in people, their organizations, and the strengths-filled, opportunity-rich world around them.

- **Dimensions of Natural and Industry Cultures:** How diverse aspects of culture influence values in the workplace.

- **Group Development Theories and Processes:** Analysis and comparison of different models proposed by well-known authors in the field of group research, such as Bruce Tuckman, Stewart Tubbs, and Marshall Scott Poole.

- **Organization Diagnosis:** Identifying gaps between where an organization is and where it ought to be using an open or closed systems model and developing custom diagnosis tools when necessary.

- **Key Success Measurements:** Identifying the high-level metrics that measure progress toward achieving an organization’s vision, mission, and core values or simply improving performance.

- **Validating Benefits:** Preparing evidence supporting the benefits of a solution or effectively addressing concerns.

- **Adapting and Energizing:** Flexing to new challenges and persisting even when internal opposition is at its greatest.

- **Organization/Work Design or Redesign:** The step-by-step methodology that identifies dysfunctional aspects of workflow, procedures, structures, and systems; realigns them to fit current business realities and goals; and develops plans to implement the changes.
and better state is an incredibly daunting task. So what skills will it take to achieve this?

The Organization Development Network, an organization of OD professionals, identifies 141 competencies required of a change agent. Among the skills are tact, tenacity, a strong backbone, and knowledge of group dynamic models. The sidebar on p. 1, Change Agent Competencies, lists a few more essential abilities. Acquiring them requires not only book learning, but practice.

7-PHASE CONSULTING MODEL

Many new consultants don’t have a process for going about their work. They may not progress in a logical or practical sequence or understand potential problems that could impede their progress.

After 40 years of consulting with organizations of all sizes and in myriad industries, at home and abroad, FirstStep OD & Training offers this seven-phase process to help new consultants proceed. It is intended for consultants who lead large-scale change projects, but can also be effective for smaller change efforts.

Before you undertake consulting work, it’s important to develop expertise and to find a niche for yourself as it relates to industry and products. See the sidebar, Finding Your Niche, for tips.

Phase 1: Initial Contact

Few consulting contracts start with an interaction with the CEO or president of a company. More commonly, the initial contact is with someone at a lower level who has read a book, listened to a presentation, watched a video, or attended a training session. Sometimes contracts result from referrals. But even those usually are below the CEO or president levels.

The Contact Person

The person who brings you into the organization is your primary contact person, regardless of their level. Most consultants seek to speak with the ultimate decision maker, but remember that the person inviting you into the organization is the initial decision maker. This person decided to recommend and defend you. It is unwise, unprofessional, and unethical to minimize this person’s role and importance.

FINDING YOUR NICHE

• Identify a product or service that is contemporary, highly lauded, and potentially needed by several organizations and for which there is ample literature and research.
• Find resources that can help you understand the product or service in detail.
• Determine whether the product or service is consistent with your consultancy’s mission, vision, values, and goals and whether it fits your existing products and services.
• Determine whether you or your associates have expertise, resources, and affinity for delivering the product or service.
• Research case studies, documentation, and business examples that attest to the benefits of the product or service.
• Establish a business case for your product or services. Be able to cite examples from several sources and industries.
• Produce high-end marketing materials and presentation justifying the business case for the product or service.
• Become comfortable and confident presenting the business case for the product or service.
• Find potential clients and understand their needs for the product or service.
**Initial Contact Actions**

During the early part of the consulting process, it’s important to—without hubris—show the potential clients why they should hire you. You do this by highlighting your experience and helping your contact realize you understand their challenges. These are some important tips for doing so:

- Build relationships at all levels in the organization. Be honest, ask questions, and respect the knowledge of the person with whom you’re conversing. Demonstrate your knowledge of the industry and with similar clients. The people you meet will be your supporters or your detractors. You will want them on your side when you approach the ultimate decision makers.

- Name drop. Mention well-known people or organizations that have used your products and services, especially those you have worked with directly.

- Establish credibility by communicating your relevant experience and expertise within the industry. Be able to speak a client’s vernacular and jargon. Know how businesses in an industry operate, how they make profits, and their typical problems and strengths.

- Position yourself as a knowledgeable, helpful resource by responding intelligently to issues a potential client raises.

- Ask questions to get clients to speak openly about their goals and the real reasons they are seeking help. People like sharing what they know, especially with people who care.

- Listen impartially without appointing blame or making premature judgments about causes of issues. Do not offer your opinion until after you hear what the client says and can adapt your response to their position.

- Convey confidence in your ability to make positive change without overpromising. The worst thing you can do is promise something you cannot deliver. Communicate realistic expectations.

- Let people know what to expect. Ensure the client knows that implementing change is difficult and that things may not happen as quickly as anticipated.

- Introduce the potential positive and negative outcomes of your initiative. You will know these from your research and experience. Focus on the positive things you can do, but allow room for the unexpected.

- Identify potential compatibility issues. Listen carefully to the client. Is this someone with whom you can work comfortably? Is your consulting style consistent with the leadership styles in the organization? Explore possible inconsistencies. Decline the contract if they are too great. Discuss potential areas of conflict with the client and establish processes for dealing with them.

**Phase 2: Contracting**

Discussing what is possible—and how long it will take—is part of phase 2. Clients want to know what you are going to do, how you are going to do it, how long it will take, and how much it will cost. Once you know how long it takes to do things such as conducting an initial assessment, analyzing and reporting assessment data,