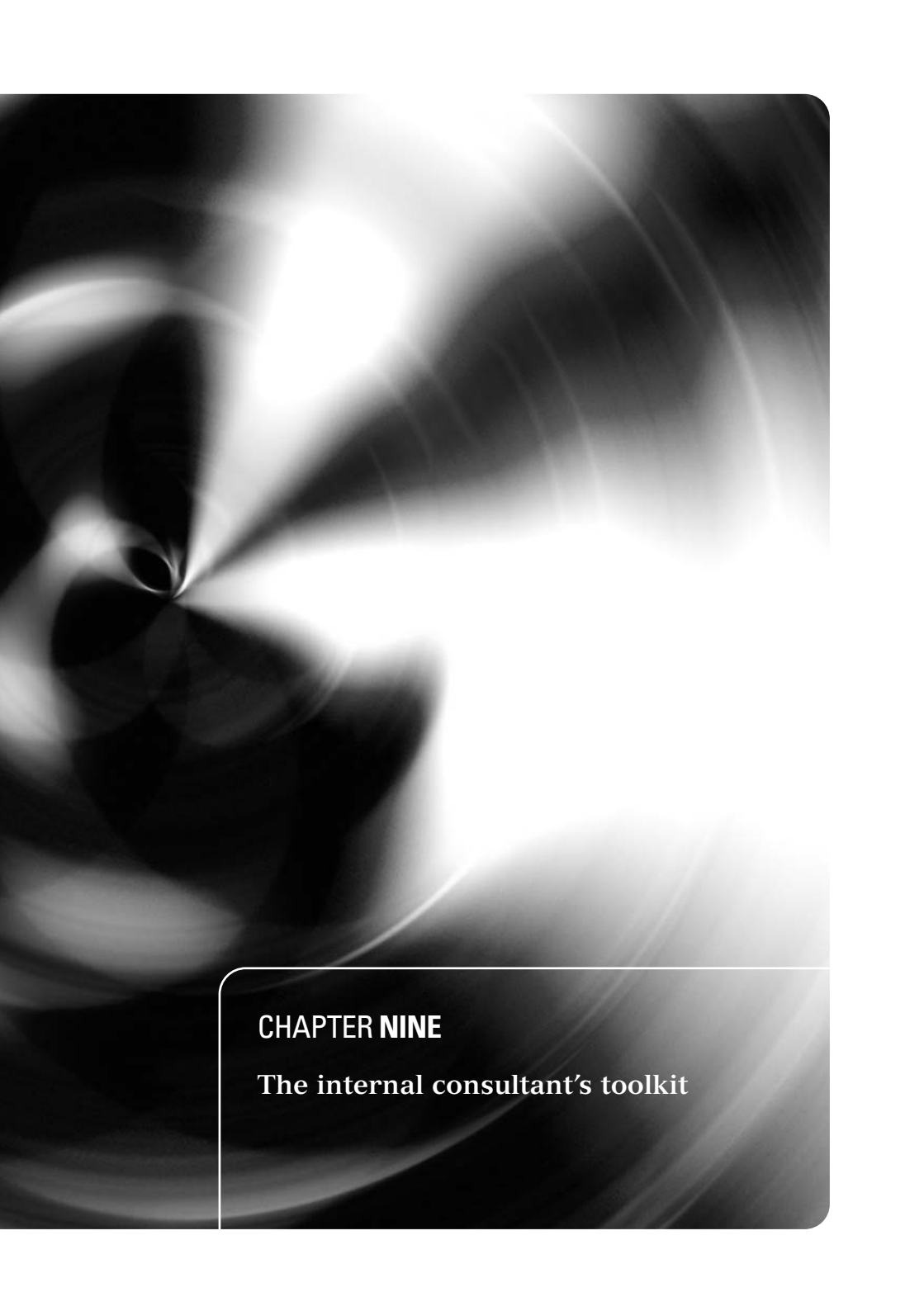




CHAPTER NINE

The internal consultant's toolkit

NINE

The internal consultant's toolkit

The consultant's toolkit

Throughout this book we have stressed the need to actively manage your client relationships and made many references to using a number of forms to assist you in this process. On the following pages we have outlined a series of single template forms that you might like to use or adapt to help you in managing your clients and projects. They cover the key elements of our internal consultant management process.

INITIAL CLIENT MEETING FORM

Date/Time

Location

Dept/Name/Present

Meeting Purpose

What is the client reporting structure?

Description of client's operation

What are your clients issues?

Initial thoughts to solve problem

Action

Next meeting date/time/place

Duration of meeting

TERMS OF REFERENCE FORM

Page 1

Client Name

Date

Consultant Name

Location

Project Name

Start Date

Background

Objective

Boundary

TERMS OF REFERENCE FORM

Constraints

Assumptions

Reporting

Deliverables and Milestones

TERMS OF REFERENCE FORM

Activity Time Chart For Project:

Activity	Who	Effort	Start	Week 1	2	3	4	5	6	7	8

Estimated Costs

Resource Name:	Rate:	Effort:	Cost:
Resource Name:	Rate:	Effort:	Cost:
Resource Name:	Rate:	Effort:	Cost:
Resource Name:	Rate:	Effort:	Cost:
Equipment Name:			Cost:
Equipment Name:			Cost:
Expenses:			Cost:
Total Estimated Costs:			

Approved by Client: _____

Date: _____

Organization capability: effectiveness questionnaire • ‘7s’ organization audit

Guidance notes

This questionnaire contains a simple series of statements that utilises the ‘7s’ model of organization analysis. The model originally featured in the best-selling business book ‘In Search of Excellence’ by Tom Peters and Bob Waterman. It is considered to highlight the features of an effective organization.

You can use this type of questionnaire in organization wide projects where you need to collect views amongst staff. Simply adjust the questions to reflect your particular areas of focus. You can then load the quantitative responses onto a spread-sheet, and use the open-ended questions to help structure your analysis and incorporate into any client presentations or reports.

You will obviously need to add a front coding sheet asking people to fill out some demographic data covering the following subject to the precise circumstances surrounding your project:

- Name
- Role/grade
- Location
- Department
- Length of service

Instructions for questionnaire completion

Consider each statement and indicate how true these are in relation to your views of, and experiences on, the organization.

There are no right or wrong answers. We are simply collecting your honest reactions and the data will be used in a confidential manner. No named comments or data responses will be revealed.

1 Strategy

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree
1 Business strategy and plans are well defined.	1	2	3	4	5
2 Strategy and plans are effectively communicated.	1	2	3	4	5
3 There is clarity throughout the organization concerning the corporate mission and vision.	1	2	3	4	5
4 Top management focuses on the medium and long-term as well as short-term issues.	1	2	3	4	5
• What changes do you see that will significantly affect your organization over the next two years? • Where do you think you need to be in two years' time to remain competitive? • What do you regard as the key performance criteria for you to measure success against? • What will have to change in order to achieve that success? • What will hinder these changes?					

2 Structure

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree
5 Manpower is at an optimum level.	1	2	3	4	5
6 Resources are organized according to business needs and priorities.	1	2	3	4	5
7 There are a minimum of control and management levels in the organization.	1	2	3	4	5
8 Responsibilities and accountabilities are clear.	1	2	3	4	5
9 Responsibility and authority are well matched.	1	2	3	4	5
10 The organization structure is flexible and responsive to changing needs.	1	2	3	4	5
11 The organization structure is integrated, rather than fragmented and operating in isolated pockets.	1	2	3	4	5
• How well do the different parts of your organization work together? • How effective is communication vertically within your organization? • How effective is communication horizontally within your organization? • What effect does the structure of your organization have upon the effectiveness of your operational efficiency? • Do people have appropriate levels of authority and responsibility?					

3 Style – management

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree
12 Management encourages delegation and innovation.	1	2	3	4	5
13 There is an emphasis on coaching rather than telling.	1	2	3	4	5
14 Individual and group achievements are recognised and rewarded.	1	2	3	4	5
15 Performance is measured against clear objectives.	1	2	3	4	5
16 Performance targets are viewed as demanding but achievable.	1	2	3	4	5
• How would you describe the way in which your organization is managed at present? • How far are you involved in decision-making outside, but affecting, your own area of management responsibility? • How far should you be involved in decision-making outside, but affecting, your own area of management responsibility? • How is conflict handled within your organization? • How far is risk-taking encouraged within your organization?					

4 Style – people

21 People are valued as individuals and treated with respect.

Strongly disagree
Disagree
Neither agree
or disagree
Agree
Strongly agree

1 2 3 4 5

22 Peoples' abilities and potential are well understood and developed.

1 2 3 4 5

23 The organization employs high calibre people.

1 2 3 4 5

24 People are used for their strengths, not penalised for their weaknesses.

1 2 3 4 5

- Who are your key people?
- What are their strengths and weaknesses in relation to your organization's goals?
- In what way(s) do you assess these strengths and weaknesses?
- What needs to be done to ensure that your key people have the capabilities to meet your organization's goals?

5 Skills

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree
25 Our skills are matched to achieve our business objectives.	1	2	3	4	5
26 Skill gaps are identified and addressed.	1	2	3	4	5
27 Skills are refined, improved and developed to meet changing business needs.	1	2	3	4	5
28 Skills are shared and transferred within the organization.	1	2	3	4	5
• How would you describe the key skills and competences of your organization?	1	2	3	4	5
• How effective do you think these are?					
• What skills will the organization need to develop in order to continue to perform effectively over the next two years?					
• What contribution do you believe training can make to your organization's performance over the next two years?					

6 Systems

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree
29 We have effective planning processes.	1	2	3	4	5
30 Tight controls of capital expenditure are present.	1	2	3	4	5
31 Effective budget management is a priority.	1	2	3	4	5
32 Effective procedures for staff performance appraisal exist.	1	2	3	4	5
33 Business and manpower plans are linked and integrated.	1	2	3	4	5
34 There are effective systems for spotting and developing managerial talent.	1	2	3	4	5
• What information do you need from outside your organization that you are not receiving at present? • How well do these systems work? • How appropriate are the systems within your organization?					

7 Shared Values

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree
35 There is a high level of loyalty to the organization.	1	2	3	4	5
36 There is a positive belief in the value of the organization's products and services.	1	2	3	4	5
37 There is a real belief in internal co-operation and collaboration at all levels.	1	2	3	4	5
38 People have a real commitment to values such as continuous improvement, quality and service.	1	2	3	4	5
- What are the underlying values that guide people in the organization? - What values need to change to ensure future success? - How do you reinforce the values of the organization among people?					

Internal consultant skills – development needs checklist



Guidelines

- Review the following list of client management skills and behaviours and identify your current performance as an internal consultant.
- There may be some activities not listed that you feel are important, record these in the spaces provided.
- Having completed the checklist, focus on the critical consulting skills and behaviours that you think you need to develop further.

General approach to consulting and client management	I am doing OK	I need to do more	I need to do less
Possessing a strong knowledge base of expertise – constantly updating my knowledge and skill base			
Feeling comfortable with my experience and professional background			
Thinking business first and functional specialist second			
Thinking before I respond to clients			
Being comfortable when working with senior management and others authority figures			

General approach to consulting and client management *(continued)*

I am doing OK

I need to do more

I need to do less

Accepting my client's definition of the problem

Challenging my client's views, opinions and definition of the problem

Presenting and selling my ideas effectively

Working confidently under time pressures

Promising only what I know I can deliver

Saying 'no' without guilt or fear

Enabling clients to use their own strengths and resources

Helping clients generate solutions to their problems

Being comfortable with saying 'goodbye' to a client at the end of a project

Being comfortable with my client taking all the credit for any success

Being comfortable with clients reviewing my work

Setting realistic goals for myself and my client

Using effective project management tools and techniques

General client management skills	I am doing OK	I need to do more	I need to do less
Actively listening to clients			
Encouraging clients to talk and share their views and thoughts			
Building an atmosphere of openness and trust			
Asking direct and probing questions			
Being brief and concise when speaking			
Stating client problems and objectives clearly			
Developing clearly agreed terms of reference			
Helping clients to own their problems			
Helping clients maintain a logical approach to solving problems and projects			
Challenging my own and the client's assumptions			
Utilising other clients' solutions to solve problems			
Critically evaluating any proposed solutions			
Challenging ineffective solutions			
Using creative problem solving techniques			

General client management skills
(continued)

I am doing OK

I need to
do more

I need to
do less

Reading and interpreting client, group and team dynamics accurately

Appreciating the impact of my behaviour on clients

Being aware of my need to compete with others

Dealing with conflict with colleagues and clients

Working with people I do not personally like

Giving into strong client demands – restrictions and limitations

Being detail focused

Taking full control and responsibility for projects

Being flexible when problems and new situations emerge

Building team spirit in my consulting and any joint consulting/client teams

Obtaining real feedback on my client presentations

General client management skills	I am doing OK	I need to do more	I need to do less
Controlling my stress when working on challenging projects			
Intervening with clients at appropriate times			
Intervening with clients without threatening or intimidating them			
Always expecting clients to use my solutions			
Acknowledging failure(s) openly and constructively			
Recognising my prejudices and biases			
Recognising my own defensiveness			
Attributing failure to the client's 'resistance'			
Admitting any errors and mistakes on my part			
Summarising, on a regular basis, client discussions and agreements			
Taking notes, 'writing up' what has been agreed, communicating to the client			
Developing and arranging clear 'next steps' and appropriate follow-up actions on projects			
Using strong project control and evaluation techniques			

What are the critical consulting skills that you want to develop further?

List them below.

- How are you going to ensure that you will develop these skills?

- What specific actions do you plan to take?

- Write down some actions now!

1

2

3

4

5

6

CONSULTING SKILLS – CLIENT MEETINGS CHECKLIST

Introductions

- Role of consultants
- Client rapport
- Objectives and focused introduction
- Timing of meeting

Observations and notes

General client management

- Teamwork
- Areas covered by each consultant
- Control of the meeting – flow, pace
- Effective use of time
- Active listening skills
- Developing client confidence
- Success in gaining information
- Answering client's questions and issues
- Challenging the client's thinking in a non-aggressive manner
- Summarising
- Re-directing client to other topics
- Keeping the client on track
- Overall flexibility
- Meeting closure
- Next steps
- Dates for next meeting – follow-up actions
- Thanking the client

Outcomes of meeting

- Information gained?
- Understanding of situation?
- Clarity of consultant's role?
- Client's reaction to the consultant?
- Overall professionalism?
- Levels of confidence?
- Teamwork in evidence?

Success factors in managing change

Success factors	Non-existent	Weak	Adequate	Good	Excellent
Common vision					
Unified management					
Surfacing of concerns					
Content management (The Plan)					
Process management (The How)					
Realistic timescales and resources					
Regular and open communications					
Systems support the change					
'Reward' to support change					
Commitments honoured					
Right people in key roles					
Involvement of those affected					
Supportive leadership					
Measurement					
Effective project management					

Change management action planning sheet

Name: _____ Location: _____ Division: _____

Critical issue definitions	Actions to address	Resource requirements	Timescales	Accountabilities	Other issues

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