

## **Collaborative and Organizational Development Consulting**

### **Problems with Traditional Approaches to Consulting**

In the past 10 years, we have learned a great deal about consulting to accomplish significant change in organizations. One of our major lessons is that approaches that work well in technical consulting, for example, in installing a computer system, often do not work well in organizational development consulting. Despite having learned that important lesson, we still refuse to change our traditional approaches to organizational consulting. Consequently, a variety of myths are perpetual. It is important for you to dispel these myths as soon as possible in your work to accomplish significant change in organizations, whether you are an external or internal consultant.

#### ***Myth of the “One-Way Expert” Organizational Consultant***

It is not uncommon that clients work from the assumption that there are consulting “experts” who can visit a client and promptly tell the client exactly what problems exist within the organization and then exactly what should be done to solve these situations. Experienced consultants and clients have realized that the “truth” in a process of organizational change emerges as you and your client work together, always sharing your perceptions, conclusions and learning. Successful organizational change is indeed a process – a journey – that you and your client take together. The accuracy of the recommendations often is not as important as your client’s commitment to – participation in – and learning from – implementing those recommendations.

This is not to say that consultants do not have expertise in how organizations function, why issues arise or what might be the range of solutions to address a given issue. As important as having this expertise is for the consultant to verify their impressions by working collaboratively with the client, as much as possible, to explore the inner workings of their client’s organization.

#### ***Myth That the Client’s Best Consultant Has “Been There, Done That”***

Clients who have never worked with organizational consultants before often seek consultants who have successfully addressed the same problem in the same type of organization as the client’s. The client’s belief is that those consultants are experts at solving that situation in the client’s organization, as well. While that belief seems valid, it is extremely difficult to apply in real life. Each organization and its culture are highly unique as are the types of problems experienced by those organizations. The most important skills required by organizational consultants often have little to do with a strong understanding of the particular products, services or programs offered by the organization or the nature of its clients. The most important skills are working with clients to apply principles of systems thinking, performance management and organizational change.

#### ***Myth of the “Savior” Consultant***

Some clients prefer that consultants somehow descend into the client’s organization, make several quick changes and then leave, having fixed the organization’s problems. Although these clients know better, they sometimes still act as if there are those kinds of “savior” consultants out there. Few, if any, organizational projects are really that simple. Consequently, many consulting projects end up not being useful, for example, strategic plans that collect dust on shelves.

### ***Myth of the Detached, Objective Consultant***

Recent innovations in organizational and management development, such as systems theory and chaos theory, have helped us realize that, as soon as you begin to interact with members of your client's organization, you become part of the overall "system" of your client's organization. You affect the organization and the organization affects you and your client. Experienced consultants have learned that the success of organizational consulting rests, in large part, on how well the consultant and client work together.

### ***Myth That All Consultants See the Same Problem the Same Way***

Each consultant brings his or her own particular view, or "lens," through which they view organizations. Also each has his or her particular biases and assumptions about how organizations should operate. The unique nature of each consultant often results in a unique perspective on problems and the approaches to solving those problems, as well.

### ***Myth That There Is One Way to Solve Each Problem***

Organizational change is a complex and dynamic process. Each organization is highly unique, depending on the nature of its environment, programs, leadership, age and size. That is why there are no "cookie cutter" or one-size-fits-all solutions that work for every problem in all organizations. Similarly, experts in organizational and management development have realized that there is no one perfect way to lead, manage or change organizations.

### ***Myth of Best Practices***

Best practices are activities associated with organizations that are recognized as high-performing. Performance is the achievement of results and best practices are activities that indicate a high likelihood of achieving those results. The practices often become standards by which we measure if an organization is effective or not. Many of the standard management practices that we mention as capacity building activities are forms of best practices. For example, to discern if an organization is high-performing, we investigate whether and how the organization is conducting Board development, strategic planning, financial management, fundraising or marketing. However, research suggests that the presence of best practices alone is insufficient to guarantee organizational effectiveness. Of more importance is *how* those practices are applied. The application should be in accordance with the unique nature and needs of the organization and should maintain continued focus on successfully serving specific needs in the community.

### ***Myth of the "Isolated Solution"***

Many consulting projects focus on one aspect of an organization, for example, financial management, fundraising, team building or marketing. It is not uncommon that shortly after a project is completed, the client realizes that another major and related problem has arisen in the organization. Your client might contact you to report that your first "solution" did not take care of all related problems in the organization. In this case, your client is displeased.

A familiar example of this problem occurs when a nonprofit hires a fundraiser to generate more revenue for the nonprofit. However, if the nonprofit does not have a strong Strategic Plan, the fundraising might not be successful. The nonprofit might end up hiring a strategic planning facilitator. However, if the Board of Directors is not ready for strategic planning, the Strategic Plan might not be strategic or get implemented at all.

## ***Myth of the "Final" Project Plan***

Usually, after your first meeting with your client, you develop a written proposal that includes a project plan that specifies the goals of the project and the activities that must be conducted to achieve those goals. Often, you are hired based on your client's perception of the quality of your project plan. However, in the vast majority of successful projects, the initial project plan is changed as you and your client work together to address the issues in your client's organization. An experienced consultant learns to present the project plan as preliminary in nature and open to change. The consultant helps the client to realize that plans often change and that change is natural.

## **Power of Collaborative Consulting with Clients**

### ***Collaborative Consulting – Structured Conversations for Change***

The precise content of recommendations for change often is not as important as your client's commitment and learning when generating and implementing those recommendations. That type of involvement from your client often produces the motivation, political support, momentum and learning that are necessary for successful organizational change. This is true whether you are an external or internal consultant.

You are more likely to get that level of commitment from your clients by working in a collaborative approach with them rather than by acting as an external expert who develops plans for change and then bestows them on your client. You should collaborate with them in as many aspects of the project as possible. Many other helping professions, for example, therapy, social work and education, have realized the critical role of working in collaboration with others.

A collaborative approach is much more likely to thoroughly identify and resolve problems. Your clients seldom struggle with an organizational (or personal) problem because they lack some specific piece of information, for example, a specific procedure or tool to be delivered by expert source. Rather, clients are often stuck in how they perceive, or feel, about things. Or, they might be stuck because of the particular organizational structures in place, such as the organization's plans, policies and procedures. You help your client along the journey of discovery and learning by providing a varied set of services (including expertise when needed), powerful questions (inquiry), supportive challenges and useful materials. Ultimately, your client is guided to take actions and learn at the same time.

A collaborative approach is more likely to generate deep and powerful learning for you and your clients because collaborative consulting is based on key principles of adult learning. Adults learn the most if they are taking actions on a current, real-life challenge and exchanging feedback with others in similar situations. Adults learn, not from memorizing information from some expert source, but rather from examining their own perceptions and assumptions about what is going on around them. Those conditions do not exist unless individuals feel strong ownership and commitment in solving their own problems, achieving their own goals and learning at the same time.

The collaborative approach often is more successful in resolving problems and generating learning because the approach benefits from the increased diversity of perceptions in a collaborative group. Note that diversity is often interpreted to mean the nature of groups where people are from different racial and/or ethnic groups. It would be wise instead to consider diversity to be the nature of groups where members have a wide range of different values, perspectives and opinions. That kind of diversity can be a tremendous source of learning because different perspectives often help group

members see all sides of a problem and how to resolve it. In addition, the diverse perspectives often cultivate more creativity and innovation than if the members all share the same values, perspectives and opinions.

The collaborative consulting cycle provides a clear structure in which you and your clients continually converse about the actions and learning in the project. Ultimately, collaborative consulting is really a philosophy. It is based on the belief that true change and learning will not take place with your client unless your client shows strong ownership, participation and commitment in that overall process of change and learning.

The design and content of this Field Guide are focused on the philosophy, guidelines, tools and techniques to help you effectively consult collaboratively with your clients.

## ***Major Benefits of Collaborative Consulting***

Consultants in organizational change efforts must be able to work comfortably in collaboration with their clients. Often, that starts by explaining collaborative consulting to your client, including why the process is so useful. You might reference the following list when outlining the benefits of working with you in a collaborative approach.

**1. Ensures you work according to goals and assumptions of effective consultants.**

Primary goals for any effective consultant are to work collaboratively with clients to ensure current problems are understood, options are identified, problems are solved and that clients can solve problems themselves in the future. A primary working assumption includes that, for projects to be successful, clients must freely provide accurate information and maintain internal commitment to the project.

**2. Provides powerful means to understanding real causes of problems.**

Organizations, like people, rarely struggle with a particular problem because of a missing piece of information or specific procedure. Rather, organizations struggle because of misalignment of parts or processes in their organizations, conflicting values or feelings, or the misconceptions of people in the organization. You and your clients have to work together to understand the symptoms and the real causes of problems.

**3. Ensures your client contributes their full value to the project.**

A highly collaborative approach to consulting continually considers your client's experiences and learning around the problems in their organization. Your client's value to the success of the consulting project cannot be overstated.

**4. Ensures that plans remain relevant, realistic and flexible during projects.**

Plans are rarely implemented exactly as planned. Instead, changes inside and outside of the organization frequently cause plans to be modified. Without the ongoing participation of your clients in changes to the plans, it is not likely that the plans will remain relevant and realistic.

**5. Ensures learning and continuous improvements in your projects.**

Learning is a critical outcome for you and your clients, from any of your consulting projects. Adults learn by applying new information to real-world situations and exchanging feedback with others. Breakthroughs in learning for you and your clients come from examining perceptions, assumptions and beliefs, rather than from memorizing new information.

6. **Ensures the most long-lasting solutions to your client's problems.**

Solutions to complex problems involve changes to structures and systems in your client's organization, not just in inspiring and motivating its people. Changes are not incorporated without the strong, ongoing ownership, commitment and participation of your clients. That commitment requires that they feel ongoing trust and collaboration with you and each other during the consulting project.