

## **Glossary of Consulting Terms**

### **Action plan**

Specification of how a specific action is to be achieved, for example, in a Change Management Plan. Includes listing of objective(s) that, when accomplished in total, accomplish the overall action. For each objective, specifies position responsible to accomplish the objective, time to start, time to stop, and who is responsible to monitor accomplishment of the objective.

### **Action Planning, Alignment and Integration (fourth consulting phase)**

Consultant and client develop actions (that were identified during Discovery and Feedback) into action plans. Also develop Evaluation Plan, Learning Plan, Recognition and Motivation Plan, and Communications Plan. All plans are integrated into an overall Change Management Plan.

### **Action research**

Well-established process for identifying and addressing complex issues in organizations. Many variations of the process exist, usually based on original stages of start-up, entry, diagnosis, implementation and evaluation. Also applicable as model for organizational change. Developed by Kurt Lewin, founder of social psychology, 50 years ago.

### **Adoption and Evaluation (sixth consulting phase)**

Consultant and client decide whether the presenting priority in the organization has been successfully addressed and whether client’s organization has adopted necessary new systems. Includes evaluation of quality of final results from project.

### **Alignment**

Relationships between subsystems in an overall system. Organizations seek optimum alignment, resulting in maximum performance of the overall organization.

### **Appreciative inquiry (AI)**

Philosophy, and associated theories, models and techniques, based on the belief that “problems” are social constructions – that they are created, in large part, by the perceptions that they exist. AI-based practices focus on the wishes and strengths of members in the organization to achieve its vision and goals.

### **Assessment**

Systematic collection of data, followed by analysis to generate findings and conclusions. More recently, assessments are often associated with recommendations. Thus, the terms evaluation and assessment are often used interchangeably.

### **Authenticity**

Capacity of a person to express themselves in an honest and direct manner based in the here-and-now.

### **Best practices**

Management practices that are widely recognized as standard and effective for achieving desired results in organizations. Examples include well-known practices, such as Board training, strategic planning and employee performance evaluations.

### **Board of Directors**

Group of people legally charged to govern a corporation, whether for-profit or nonprofit.

### **Business development**

Activities to expand the impact and/or revenues of an organization. Includes researching the environment to identify all opportunities to provide services, conducting a feasibility study of each likely opportunity, and developing a Business Plan for each of the most likely opportunities.

### **Business planning**

Activities to clarify the need for a product or service in a general market, specific groups of people (target markets) having that need, how the product or service meets each group’s particular needs, resources needed to develop and provide the product or service, how the resources will be organized and managed, costs to obtain and support use of the resources, and how communications between the organization and markets will be coordinated. Information is often organized into subsections of a business plan, such as description of the product or service, marketing plan, management plan and financial plan.

### **Capacity building**

Activities to help an organization to enhance its effectiveness.

### **Change agent**

Are various perspectives on this role. For example, could be the person internal to the organization who leads the change in the organization by setting direction and influencing others to follow that direction. Also, could be the person external to the organization who provides ongoing expertise and guidance to those internal to the organization in order to change their organization.

### **Change management plan (CMP)**

Documented description of the organization’s presenting priority and action plans to address the priority. Can also include: 1) Evaluation Plan to assess the progress toward the addressing priority, 2) Communications Plan to ensure all key personnel are aware of the CMP, 3) Recognition and Motivation Plan to ensure members of the organization are motivated to implement the CMP, and 4) Learning Plan to recognize and utilize all important learning from implementing the CMP.

### **Change model**

Organized body of theory and guidelines (and sometimes tools) that provides guidance to analyze organizations and suggests actions for change (thereby sometimes acting as an organizational diagnostic model). Can also provide guidance for making adjustments to actions and how to sustain change. Examples include the action research process, Business Process Re-engineering and Future Search Conference.

**Chief Executive Officer**

Singular organizational position responsible to implement the policies and plans of the Board of Directors, and to lead and manage all other employees.

**Client Start-Up (first consulting phase)**

Client first realizes the presenting priority (problems to be solved or goals to be achieved) in their organization. Client begins thinking about how to address the priority, for example, by bringing in an external consultant.

**Client**

Person or group who approves, works with, and/or is affected by, the consultant’s activities in an organization. Are several types: 1) official client hires, pays, makes major decisions, ultimately decides if the project was successful, and is usually the same throughout the project; 2) direct clients directly work with the consultant at various times, can be different people, and are always the consultant’s current priority for effective collaboration; and 3) indirect clients are indirectly and ultimately affected by the consultant’s activities in the organization.

**Coaching (personal and professional)**

Using a variety of tools (assessments, deep listening, inquiry, action planning, etc.) to guide and support another individual or group to identify their current priorities, take actions to address those priorities, and learn from reflections on those actions. There are different types of coaching, for example, “being” and performance coaching, and also applications of coaching, such as life, business and executive.

**Collaborative consulting cycle**

Highly integrated set of collaborative consulting activities intended to address the presenting priority in an organization. Includes seven phases: Client Start-Up; Engagement and Agreement; Discovery and Feedback; Action Planning, Alignment and Integration; Implementation and Change Management; Adoption and Evaluation; and Project Termination.

**Collaborative consulting**

Philosophy of consulting in which the consultant and client work in partnership to address the presenting priority in the client’s organization. Philosophy asserts that, the more collaborative the consulting activities, then the more trust, commitment and collaboration gained from the client and, thus, the more long lasting and successful the results of the consulting activities in the client’s organization.

**Communications Plan**

Documented description of how a Change Management Plan will be communicated to key personnel inside and outside of the organization.

**Consultant**

Block (2000) explains that a consultant is someone trying to change another person or organization, but who has no direct control over that person.

## **Consulting**

Activities carried out by a consultant to help a client address their presenting priority in their organization. Activities can be in various forms, for example, provision of resources, trainings, coaching or facilitation. Often conducted in various phases that generally conform to phases of the action research process.

## **Content (facilitation)**

Information, materials and other resources that group members are working on in their group. In contrast to process, which includes information, materials and other resources that are directly in regard to how a group of people function together.

## **Context-sensitive features**

Certain aspects of an organization that make it unique, including especially its culture, life cycle, size, source and style of top-level leadership, structure and strategies, and rate of change in the external environment.

## **Culture**

Personality of an organization as defined by the aggregate of values, assumptions, opinions, behaviors, etc., by which members act in the organization. Is a context-sensitive feature of an organization that makes it unique from other organizations.

## **Discovery and Feedback (third consulting phase)**

Consultant and client further examine the presenting priority. Includes systematic data collection and analysis to fully examine the presenting priority and generate recommendations to address issues. Ends with carefully planned activities to share (or feed back) the results of the discovery to others in the organization.

## **Domain**

Focus of the performance management system, for example, an individual position, team, project, cross-functional process, function, product or the entire organization.

## **Engagement and Agreement (second consulting phase)**

Usually the first time the consultant and client meet. Overall goals are for both to understand each other’s nature and needs, articulate how each prefers to work, begin exploring the presenting priority in the client’s organization, assess the readiness of the client to begin a consulting project, decide if there is a suitable match between both of them, and then decide next steps, such as how a formal agreement can be established.

## **Environment**

All systems, materials and information that exist outside of the boundaries of a system. To be effective, systems exchange and address ongoing feedback with their environment.

## **Ethics**

Simply put, ethics involves learning what is right or wrong, and then doing the right thing. Ethics includes the fundamental ground rules by which we live our lives. A code of ethics is an articulated set of values or principles by which a person or group should act.

### **Evaluation**

Systematic collection and analysis of data to make a decision. Includes generation of findings and recommendations to address findings.

### **Evaluation (formative)**

Evaluation of the quality of activities while those activities are being conducted. Primarily intended to improve the quality of those activities while underway.

### **Evaluation (summative)**

Evaluation of the quality of final results after activities have been finished. Primarily intended to determine if the desired results have been achieved or not.

### **Evaluation Plan**

Documented description of how the results of a project will be evaluated (summative evaluation). Can also include description of how project activities will be evaluated while underway (formative evaluation). Identifies what information is needed, how it will be collected, who will collect it and when.

### **External consultant**

Someone considered not to be an official, ongoing member of the organization. The one-time relationship of the consultant to the organization is determined usually by a project’s contract or Letter of Agreement. Payment is on the basis of a particular project that specifies certain desired results and deliverables from the consultant. Payroll taxes are not withheld from the person’s paycheck – the person pays their own payroll taxes.

### **Facilitating**

Helping a group to decide what results they want to achieve together, how they want to achieve them and then helping the group to achieve them. Styles range from highly directive to indirect.

### **Feedback**

Information provided to, received by, or exchanged between systems and useful to enhancing the performance of one or more systems.

### **Financial management**

Activities to ensure the organization’s finances are effectively accounted for, legally allocated, at minimum risk and utilized in an optimum manner. Includes operating according to fiscal policies and procedures, bookkeeping to monitor and record transactions, generating and analyzing financial statements, and actions to improve financial management.

### **Founder’s Syndrome**

Exists when an organization operates more according to the personality of someone in the organization (not always the founder) than to its mission.

### **Function**

Highly integrated set of ongoing management activities. For example, Board operations, staffing, marketing and sales, financial management and evaluations.

### **Implementation and Change Management (fifth consulting phase)**

Consultant and client guide and support implementation of the Change Management Plan. Focus is on implementation according to principles of successful organizational change. Consultant and client use a variety of tools to monitor status of implementation. Ensuring ongoing motivation and momentum is of primary importance.

### **Indicators**

Measures of performance that suggest the extent of progress toward achieving certain desired results.

### **Inputs**

Tangible or intangible resources used by various processes in a system to produce outputs and outcomes from the system. Types of inputs are people, money, equipment, facilities, supplies, ideas and time.

### **Internal consultant**

Someone considered to be an official, often ongoing member of the organization. The relationship of the consultant to the organization is determined usually by a job description and various personnel policies. Payment is on the basis on their ongoing official roles in the organization. Payroll taxes are withheld from the person’s paychecks. Successful internal consultants for change often use a highly collaborative and facilitative approach – the same style required by internal leaders to successfully guide change. Therefore, leaders can also sometimes be considered internal consultants.

### **Intervention**

An activity introduced into a system to address a current problem or achieve a goal for that system, for example, forms of capacity building for an organization, such as training, coaching or strategic planning.

### **Leader**

Person who conducts leadership activities or has that capacity in an organization. Anyone in the organization can be a leader. Commonly refers to official roles of top-level influence, such as Board Chair, Chief Executive Officer or Chief Operating Officer. Leader can act as internal change agent if working to guide change internally.

### **Leadership**

Activities or capacity to establish direction and influence a domain to follow that direction. Type of skills required depends on the domain of leadership, for example, leading self, other individuals, other groups, an organization, a community or a society. Can also refer to leadership traits or leadership roles.

### **Learning Plan**

Documented description of how learning will be recognized and utilized during implementation of the Change Management Plan.

**Learning**

Enhanced or enhancing knowledge, behaviors, skills, attitudes, conditions or values.

**Life cycle**

Stage of development of a system. There are various perspectives on the types and numbers of stages, for example, stages of start-up, growth and maturity, with stagnation or development between each of those three stages.

**Logic model**

Graphic depiction of a system. Includes depiction of the system’s inputs, processes, outputs and outcomes.

**Management system**

Systematic activities in managing a particular system. Includes inputs to the system, planning, developing, operating, evaluating and outputs from system. For example, each function (Boards, strategic planning, marketing, etc.) has its own management system.

**Management**

Traditionally, refers to the activities involved in the four general practices: planning, organizing, leading and coordinating. The four functions recur throughout the organization and are highly integrated.

**Marketing**

Activities to establish and maintain a beneficial and ongoing relationship between an organization and certain groups of external stakeholders. “Inbound” marketing includes researching the external environment to: 1) identify the specific types of needs of each specific group of customers, 2) how to meet each of those needs, 3) what value (prices, fees, etc.) needs to be obtained in return for meeting those needs, 4) what collaborators exist and 5) what competitors exist. “Outbound” marketing includes: 6) advertising, 7) promotions and 8) public relations to enlighten stakeholders about products, services and the organization.

**Measures**

Objective information that provides specific information, such as indicators toward achievement of results. Typically expressed in terms of time, quantity, quality or cost. Results are a form of measures.

**Members (of the organization)**

This Field Guide considers members of an organization to include members of the Board of Directors and the employees

**Open systems**

Viewpoint that healthy systems regularly exchange feedback with, and are influenced by, their external environments (environments outside the boundaries of the systems). Includes the concept of equifinality, that there is more than one way to accomplish the same or similar result in a system. Thus, there is no one right way to, for example, lead, manage and guide change in an organization.

### **Organization Development (OD)**

Field dedicated to expanding the knowledge and effectiveness of people to accomplish more successful organizational change and performance. Different people often have different perspectives on the field, depending on their particular values and skills.

### **Organizational change**

Nature of activities to accomplish significant change and development in an organization.

### **Organizational development**

(See organizational change.)

### **Organizational diagnostic model**

Are differing opinions. Some people suggest that models should come without bias or suggested solutions, and should be used to accomplish an objective, unfolding understanding of organizations. Others believe that models should suggest what types of practices should be occurring in the organization, the order in which those practices should be occurring, and standards of performance for the various practices.

### **Organizational effectiveness**

Success of an organization in working toward its mission and achieving its goals in a highly effective and efficient manner.

### **Outcomes**

Changes in the external environment as a result of a system’s activities. Can be used to measure the performance of the system. Refers especially to changes for customers from using a product or service, including changes to their: 1) knowledge (short-term outcomes); 2) behaviors (intermediate outcomes); and 3) conditions, comfort, attitudes, values, etc. In contrast to outputs, which can measure changes internal to the system.

### **Outputs**

Tangible results produced by a system. Can often be used to measure quantitative changes internal to a system. Often described by using numbers, such as the number of graduates produced by a certain program. In contrast to outcomes, which measures changes external to the system.

### **Performance appraisal**

Assessment of extent and quality of a system’s progress toward achieving certain desired results, along with whether certain performance standards were met or not.

### **Performance development plan**

Conveys how the conclusion was made that a change in performance was desired and also how that change will be accomplished, whether remedial or developmental. Includes identification of specific standards and/or desired results, what actions are to be taken and by whom in order to improve performance, and when performance will be assessed again and how.

**Performance management**

Activities to select results to be achieved by a system, monitor indicators toward achieving those results, reinforce behaviors where results are being effectively achieved, and improve performance where results are not being effectively achieved. In contrast to “busyness” where activities, although frequent, are not directly in regard to achieving desired results.

**Polarity**

A situation in which there seems to be two “sides” and one “side” is highly dependent on, or can be affected by, the other “side.” The sides are seemingly contradictory, but cannot completely exist without the presence, of the other. Examples include: inhale versus exhale, cost versus quality and decentralize versus centralize.

**Presenting priority**

A current major priority in the client’s organization which causes the client to seek assistance to address the priority. Also referred to as a presenting problem.

**Process (cross-functional)**

Organizational activities that span more than one major subsystem in an organization. For example, processes of information technology and quality management.

**Process (facilitation)**

Information, materials and other resources directly in regard to how a group of people function together. In contrast to content, which is information, materials and others resources in regard to what members are working on in their group.

**Processes (system)**

Activities to manipulate the system’s inputs to achieve the overall desired results (outputs and outcomes) of the system.

**Product**

A commodity, usually tangible, that is offered for sale. A service is a commodity, often intangible, that is offered for sale.

**Product development**

Activities to identify, specify, design and build a product in order later to sell it to customers.

**Project plan**

Documented description of the results to be achieved by a project, along with methods to achieve those results, resources needed to use the methods, roles and responsibilities of the consultant and client during the project, budget for the project, and schedule for the project.

**Project Termination (seventh consulting phase)**

Consultant and client formally terminate the consulting project and relationship. Both reflect on project achievements and learning.

**Recognition and Motivation Plan**

Documented description of how leaders in the organization will ensure that members of the organization are motivated and sustain momentum to implement the Change Management Plan.

**Resistance (individual and group)**

Emotional response in reaction to a perceived threat from current or intended change. Can be direct or indirect. Direct resistance is the person's authentic (direct, honest and open) expression about the perceived threat and why they are not going to support the change. Indirect resistance is when the person does not authentically express their concern about why they will not support the change. Usually, resistance is indirect and, therefore, can be difficult for the consultant and client to recognize and address.

**Resource development**

Activities to obtain resources and make them ready for utilization by the organization, for example, regarding people, funding, facilities and materials.

**Results**

Overall accomplishments desired from the performance of the domain. Are measures of products, services or changes (outcomes) for an internal or external customer. Often expressed in terms of cost, quality, quantity, time or learning.

**Rewards**

Various forms of reinforcement intended to guide and/or reinforce a system's performance toward achieving desired results. Rewards in employee performance management might include merit increases, promotions, certificates of appreciation and letters of commendation.

**Services**

A commodity, usually intangible, that is offered for sale. A product is a commodity, often tangible, that is offered for sale.

**SMART**

An acronym for Specific, Measurable, Achievable, Relevant and Time-bound. Often used to suggest the nature of useful goals and objectives.

**Stakeholder**

Person or group of people who have an interest in, or are affected by, the organization now and/or in the near future.

**Standard**

Specifies how well a desired result should be, or was, achieved by a system. For example, "meets expectations" or "exceeds expectations."

**Standards of excellence**

Principles that are widely recognized as standard and effective for guiding management practices toward achieving desired results in organizations.

**Strategic management**

Systematic implementation of a Strategic Plan, including monitoring status of implementation and making adjustments to implementation and/or the Plan, as necessary.

**Strategic planning**

Major activity carried out on a regular basis to clarify the organization's purpose (mission), desired results (vision, goals and objectives), when the results are to be achieved, and by whom. Sometimes specifies the overall nature (values) in how results are to be achieved.

### **Structures**

Plans, policies, positions, procedures, etc., that configure and guide the overall relationships, integration and performance of systems in an organization.

### **Subsystem**

System that is part of another overall system, where the part has its own inputs, processes and outputs, which share feedback with the larger, overall system. For example, a department or division of an organization.

### **Supervision**

Activities by a supervisor to oversee the progress and productivity of people who report directly to the supervisor. Includes activities of employee performance management, such as staffing analysis, specification of duties and responsibilities (job description), recruitment and selection of employees, assignment of goals, feedback on achievement of goals, rewarding achievement of goals and addressing performance problems.

### **Supervisor**

Position in an organization that is responsible for supervision of people who report directly to the supervisor.

### **System**

A collection of resources and activities aligned and integrated to accomplish an overall goal. Includes inputs, processes and outputs to achieve the goal. An automobile engine is a system. A pile of sand is not a system.

### **Systematic**

In the nature of a system; a methodological approach to have goal(s), monitor feedback regarding achievement of goal(s), and make necessary adjustments to more effectively achieve the goal(s).

### **Systems theory**

Field which studies systems from the perspective of the whole system, its various subsystems and the recurring patterns in the relationships between the subsystems. Has spawned a manner of thinking (systems thinking) that has produced principles and tools for understanding and changing systems.

### **Systems thinking**

Approach to analyze and understand systems by identifying the overall goals of the system, its various subsystems, recurring structures and patterns in the relationships among the subsystems, and, in particular, the quality of those relationships and how they might be better integrated and aligned.

### **Team building**

Activities to form and develop a small group of people to effectively work toward a common purpose and achieve specific goals. At a minimum, includes clarifying the group’s purpose and goals, leadership roles, means of communication, and how members will make decisions and solve problems.

### **Teamwork**

Activities among team members to effectively achieve the results desired from the team.

Adapted from “Field Guide to Consulting and Organizational Development” – to obtain the entire book, select “Publications” at <http://www.authenticityconsulting.com>

### **Training**

Traditionally, activities to convey specific information to help an individual or group to more effectively do a current or future task or job.

### **Turnaround**

Outcome from a project for change where the organization previously experienced issues throughout most or all of the organization and now, as a result of the project, has resolved most or all of the issues and is experiencing strong performance.

### **Vision for change**

Description of an organization and its customers at some point in the future. Often used as guiding and motivational tool during change. Strategic vision depicts a realistic state that will be achieved by implementing the Change Management Plan. Grand vision depicts an ideal state, often at a time farther out than the time of the strategic vision.

### **Whole systems thinking**

Approaches to examine an entire system and how to address all major issues and goals in the system. The positive effect of those solutions leverages improvement throughout the system.