

Strategic Consulting – 10 Biggest Learning Moments for OD Consultants



CONSULTANTS
DEVELOPMENT
INSTITUTE

Carter McNamara, MBA, PhD
Authenticity Consulting, LLC

What Are Learning Moments?

- Key comment or action that regularly:
 - Transforms how a person sees something
 - Produces an “Aha!”
 - Breaks lose a stuck situation
- I noticed these recurring moments from:
 - Over 1500 coaching sessions in groups
 - 30 years OD consulting
 - Mentoring over 20 years

My “Filter” in Noticing These

- Most powerful consulting comes from:
 1. Cultivating authentic, collaborative relationships
 2. Continually reflecting and learning together
 3. Adopting approaches based on new learning
- This is collaborative consulting
 - Is not a proprietary consulting model
 - Cultivates most commitment and participation
 - Underlies most successful approaches in OD

1. Foundation for Learning – Maintain Your Motivation

- When motivation is lacking, you're not learning
- Manage your motivators
 - Build your motivators into your work
 - Minimize de-motivators in your work
- What uniquely motivates you in consulting?

<input type="checkbox"/> Learning?	<input type="checkbox"/> Praise from the client?
<input type="checkbox"/> Making money?	<input type="checkbox"/> Solving problems?
<input type="checkbox"/> Reputation?	<input type="checkbox"/> Work-life balance?
<input type="checkbox"/> Influence?	<input type="checkbox"/> Guiding others



2. Catalysts for Learning – Know Method and Metaphor

- Mix methods and metaphors for learning
- Is your natural consulting method primarily:
 - Roadmap of integrated phases?
 - Garden of unfolding activities?
- What primarily describes your view of org's?
 - Structure of plans, policies and procedures
 - Family of feelings, beliefs and perceptions



3. Universal for Learning– Make Learning Conscious

- Regularly ask “What are we learning?”
- Benefits of this question
 - Affirms what we have accomplished
 - Reminds client it is “we”
 - Opens up possibilities
- Define learning
 - As new knowledge, skills and perceptions
 - Can be re-affirming what we already knew!



4. Engagement Phase – Focus on Mutual Benefit


- Avoid focus on selling and solving, instead ...
- “Is there a mutually beneficial relationship?”
 - What do they want?
 - What do you want?
 - Is there a match?
- Focus proposal primarily on:
 - Ensuring you understand each other
 - Ensuring you agree on the goal of the project

5. Engagement Phase – Ask Behaviors, Not Culture

- Focus on results of culture, not on culture
- Don't ask “What is your culture?”
 - Answers are very biased and stereotyped
- Instead, ask about behaviors
 - How do you do planning?
 - How do you make decisions?
 - How do you solve problems?
 - Any cultural-specific behaviors I should know?



6. Discovery Phase – Start Project Team

- Best source of help is your client
- Work with a Project Team
 - Teach basics of successful organizational change 
 - They help with your plans, questions, results
 - All others see as “Team”, not outside “consultant”
- Include:
 - Authoritative person – the official decision-maker
 - Current client – person with influence and access
 - 1-2 who will be implementing a current plan

7. Discovery Phase – Focus on Ultimate Outcome

- People don't get stuck for lack of procedures
- Most powerful tool for analysis and learning
 - Mix the metaphors (structure vs. family)
 - Mix the methods (roadmap vs. garden)
 - “What are we learning?”
- Don't need perfect analysis, recommendations
 - Focus on obvious *what* to do, not on *how* to do
 - Most important result: focus and mobilize client
 - Discovery itself is a big “intervention”

8. Implementation Phase – Resistance: Whose Problem?

- Reframe it as your problem, not client's
- Use simple authenticity:
 1. Tell client what you are seeing and hearing
 2. Tell how you think it's a problem
 3. Ask “What do you/we want to do about it?”
- Meanwhile:
 - Don't judge or diagnose them
 - Do listen and be persistent



9a. Implementation Phase – Manage Your Own Resistance

- If can't deal with yours, can't deal with client's
- Are you recognizing your indirect resistance?
 - Being overly optimistic in estimates?
 - Jumping to solutions?
 - Doing work that client should do?
 - Not respectfully confronting client?
 - Not saying “I don't know”?
 - Not asking for help, when you should?

9b. Implementation Phase – Manage Your Resistance (cont.)

- Practice recognizing fear, to know its first signs
- Practice simple authenticity with loved ones
- Do code of ethics – what you will & won't do
- Know your abilities – and when stretching limits
- Stress confidentiality (safety) in conversations
- Evolve to using simple authenticity with others
- Explain simple authenticity to others



10. Evaluation Phase – Focus On Ultimate Outcome

- Reframe evaluation as big learning cycle
- Schedule specific time to ask the client:
 - Have we achieved “success” now? If not, ideas?
 - You solve similar problems? If not, what’s needed?
 - How was our working relationship?
 - What are the new learnings for you?
- Share your learnings, as well



Invitation: Structure Ongoing Learning

- Learning is an outcome – and a discipline
- Best way to benefit from learning
 - See as new knowledge, skills and perceptions
 - Structure ongoing reflections, actions and learning
- Join peer group to share ongoing:
 - Feedback, inquiry and reflections
 - Support and accountabilities to take actions
- Consider MNODN's consulting training!