CONSULTING SKILLS

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CONSULTING SKILLS WORKSHOPS FROM

***WHAT IS A CONSULTING SKILLS WORKSHOP*?**
A consulting skills workshop is a combination of classroom instruction, case studies, and guided, practical application tasks designed to help individuals and teams develop the competencies necessary to help clients solve problems or exploit opportunities. The workshops consist of a number of modules that can be configured in many different ways depending on need.

WHAT ARE CONSULTING SKILLS?
Most successful consultants have two basic sets of skills, knowledge and abilities. The first set is derived from the professional or technical field in which they consult such as accounting, engineering, human resources, management, agriculture, education, lending, community development or whatever. We do not normally deal with these in our consulting skills workshops. Participants are expected to bring them.
The second set of skill are those that allow the first set to get utilized in an interaction with a client. These are..

- the **relating skills** that lead to a trusting relationship;
- the **discovery skills** that help the client find and define the problem or opportunity,;
- the **presenting skills** that allow the consultant to make his or her professional competencies accessible to the client; and
- the **supporting skills** to help the client through the change process.

It is this latter set of skills that form the core of our consulting skills workshops.
THE CONSULTING SKILLS MANUAL
Accompanying the workshop is a popular Consulting Skills manual that is widely used even by organizations that have not participated in the workshops. It even serves as a text in a Canadian university business degree program. The manual has a fairly generic first part that consists of ten chapters dealing with all of the details of the consulting process that are common to all consultants. The second

INSIDE

DELIVERY OPTIONS

We have delivered this workshop in various configurations all over the world. Sometimes its just a two-day overview. Often it is a two week program with consulting assignments built-in. And on occasion the program has consisted of several months of training with internships in consulting organizations as an integral part of the learning.

Longer programs typically involve both consulting process skills and content learning in the discipline within which the consultant operates. SEQUUS instructors are all full-time consultants with dozens of years of experience in a variety of disciplines including general management, organization development, small business development, industrial engineering, human resources etc..

However, we cannot cover every field. So, when technical or professional content is part of the learning goals, our team is often supplemented by content specialists from the target discipline. Talk to us early so we can put together the right team for you.

part usually consists of a custom-tailored toolkit put together for the particular type of consulting in which the workshop participants are engaged. The tools relate to each step in a six part consulting process that forms the structure for the workshop.

THE CONSULTING SKILLS MODULES
There are twelve core modules for the program. A workshop might consist of an overview of all twelve modules, but it is more likely to consist of a few modules dealt with in depth followed by structured practise. The core modules are devoted to each of the six steps in the consulting process. The other six modules consist of ..

- an introductory module,
- three modules on consulting style,
- one module on personality, and
- one that covers the entire six-step consulting process.

THE CONSULTING PROCESS

a ***six step consulting process..***
1. ENTRY or 'Making first contact with the client'. While this is an obvious first step, it makes a great deal of difference if the client invites you into their organization, you invite yourself in, or a third part sends you in.

2. CONTRACTING or 'building a "win-win" relationship'. Once 'in', the contract between you and your client is the next critical step. Often there is more than one 'contracting' session. You may need one contract to do the initial diagnosis and another to help find solutions. In larger assignments, multiple contracts may be needed to work through an entire cycle.

3. PROBLEM/OPPORTUNITY-FINDING: this is the analysis and/or the exploratory part of the process. This where the diagnosis occurs. In complex situations, this could form the heart of the contract and consume most of the time. On the other hand, it could simply mean confirming a client's 'problem statement'. This is also where we often use surveys and focus groups to collect 'hard data' about 'soft' issues.
4. SOLUTION/INNOVATION FINDING: Once the problem or opportunity is clearly understood and both the client and the consultant have the same understanding, then (and in our view, only then) can we look for solutions to resolve the 'problem' or suggest strategies to exploit an 'opportunity'.

5. IMPLEMENTING: this module covers *planning the work*, and *working the plan.*. This phase involves hard work and details. Each focus area needs some action plans showing who is going to do what, when, where, why, how, with what resources, and so on. It also often includes selling or persuading those who were not at the table when the plans were made. This is a critical phase and is made easier the more people who need to implement the plans are given a chance to be at the table when those plans are made.

6. EVALUATING outcomes and **TERMINATING** the relationship. Consultants often find themselves working themselves out of a job. In an ideal world, consultants leave their clients with the capacity to carry on independently and both feel comfortable when a project comes to an end. However, for a variety of reasons the first project is only the beginning of a series of successful ventures with a client. Each new venture is built on a careful review of the strengths of the previous encounter and plans to deal with areas that need improvement. The end of an assignment should also include a review of the relationship and plans to build it further.

This module is...
DURATION:
INSTRUCTOR:
LEARNING GOALS:
CONTENT:
REGISTRATION FEE:

CONSULTING STYLE: A popular core component of our Consulting Skills workshops is the concept of 'Consulting Style'. This concept is based on the theory that each of us comes at the job of consulting with a unique personal approach that is based partly on our personality and partly on an intuitive sense of what is most likely to be productive. Sometimes it works out, sometimes it doesn't.

The "Consulting Style' concept brings these natural, unconscious behaviours up to the conscious level where participants can explore a full range of behavioural options and use some explicit guidelines to predict which pattern is most likely to succeed. Then you get to try each style out in simulations.

Our model contains four options; CONSULTANT-CENTERED, CLIENT-CENTERED, COLLABORATE, and EXPLORE. We use questionnaires completed by participants and by others in their work environment to provide feedback to individuals on their unique, natural consulting style(s) and on those styles that need development.

Those of us who choose to be consultants are often different from those who choose to be leaders and managers in large organizations. We are often helpful to

PERSONALITY & CONSULTING

our clients because we look at problems and opportunities in a way that is different from that of our clients. At the same time, those differences can get in the way of communications. We believe that consultants should know and understand the basic personality types that exist and how each tends to look at ‘problems’ and ‘opportunities’. Consultants should be able to quickly diagnose the type that best fits the client with whom he or she is working and should be able to adapt his or her communications pattern to that of the client.

This skill is particularly evident in report writing. Consultants are often called upon to write reports and are equally often surprised when clients either don’t read them or don’t understand them if they have. Some personality types prefer short, point-form reports without a lot of background. Others find background and detail essential. Still others want to know of the impact on people and reputation. While some prefer creativity and originality. If you can only write in one style, you are limiting the range of clients whom you can serve.

MORE INFO…

WHO PARTICIPATES IN THIS KIND OF WORKSHOP?
This workshop has its origins in an assignment with the Caribbean Development Bank in response to a request to train small business counsellors. Small Business Consultants in every Canadian province and in many countries of the world have since benefited from the program. Credit Union systems throughout Canada provide centralized consulting to their member credit unions, many of their consultants have been through the workshop. Child Guidance Workers, Agriculture field staff, Human Resource Professionals, Accountants, Management Consultants, Community Economic Development Workers and International Development Staff have been among the diverse groups of participants.

HOW MUCH WILL IT COST?
Instruction fees are based on the number of classroom days involved. Generally, the longer the engagement, the lower the cost of each unit of time. Materials such as manuals, tests, readings and instruments are priced by the number of participants. Additional costs would typically be for travel and living. Our proposal to you would be very specific as to costs.

HOW DO WE GET STARTED?
The first step is usually a meeting between a SEQUUS Director and you. You will provide your needs, wants, hopes, expectations, conditions and constraints. We will respond with a proposal to meet your situation. We build from this base until you are satisfied.

CONSULTING TOOLS

Our clients tell us that we take the mystery out of consulting. We try to make the process simple, straightforward and accessible to clients as well as consultants. This allows the complex work to proceed without getting lost in complex, expert-driven approaches.

We have developed many tools to help the consultant help the client, and we have developed some to help the consultant develop his or her own skills and to manage the process from start to end.

- **The Consulting Worksheet**: an four-panel worksheet walks a consultant through the entire six step process with helpful hints for each step.
- **The Client File Worksheet**: this four-panel worksheet lays out some of the basics you might want to record about a client at the beginning of an assignment.
- **Consulting Style Self:** this questionnaire collects your own impressions of your consulting style.
- **Consulting Style Other:** this questionnaire collects the impressions of others about your consulting style.
- **Consulting Style Scoring and Interpretation:** this document allows you to score and interpret the above two questionnaires.
- **Common Sense:** this instrument provides feedback on Personality Types.

Planning and Analysis Tools: SEQUUS has produced hundreds of practical worksheets, instruments, questionnaires and other tools to help us do our work

And there are others. Some consultants prefer to work on their own but use our tools. Some want customized versions adapted to their special needs and terminology.

DATA COLLECTION TOOLS

Our approach to consulting is to help clients develop solutions or innovations based on hard evidence, even when the issues are soft and fuzzy. We tend to use a lot of surveys and focus groups. Over the years we have developed some fairly standard tools and techniques which we often share with other consultants. Among the more popular are...

ORGANIZATION DIAGNOSTIC QUESTIONNAIRE (ODQ): One of our more popular surveys is the ODQ. The standard version of this questionnaire contains up to 80 questions that are sorted into categories such as Service Quality, Service Delivery, Performance Culture, Leadership & Management, Human Resource Management, Financial Management, Problem-Solving & Decision Making, Change & Stress, and Ethics & Values. Typically, employees at all levels respond to this questionnaire.

TRAINING NEEDS ASSESSMENT QUESTIONNAIRES: We have developed needs assessment instruments for many different kinds of occupations including the various levels of management in an organization.

CLIENT-CUSTOMER-MEMBER SERVICE: The major stakeholder in the future of most organizations is the person who consumes or benefits from the organization's products or services. This questionnaire uncovers what is important to them and reveals how you are performing.

We also survey board members, referral agencies, funders and

LET US DEVELOP A PROPOSAL TO ASSIST YOUR ORGANIZATION. CALL OR WRITE TODAY!

For more information or to have someone visit your organization, send your contact information to..
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