# THINK!

Productivity through effective business engagement

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## Productivity Through Effective Business Engagement

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# Preface

The Engagement Skills Workshop (formerly known as Consulting Skills Workshop) has been running since February 2003, and by early 2010 over 2500 participants had attended one of the 200 plus events conducted in Australia, Argentina, China, Hong Kong, India, Italy, Malaysia, New Zealand, Romania, Singapore, UK and USA. Each event has been different as each group brings its own distinct ideas to the discussions, and over time the material evolves and changes. In every workshop that I, and my fellow facilitators have run, we have gained new ideas and insights. These discoveries are often incorporated into future events.

This book is designed to be a resource for the Workshop. As we discuss during the workshop, there are no right and wrong answers. Some approaches are more effective than others but it depends on the audience. Reading this book will stimulate your thinking but it won't replace the interaction and discussion with colleagues. For the attendees of the Workshop, this book provides a useful reminder of the things we should focus on.

The content of the workshop is not brand new or unknown to everyone. It is mostly good common sense, developed over centuries. As one of my co-facilitators often remarks:

***"The trouble with common sense is that it is not all that common!"***

The beauty of the lessons from the book and the workshop is that we can all improve in the areas of inter-personal interaction, just by thinking about it a bit more. This can have a dramatic impact on our overall performance, in our business and personal lives. Importantly, it can impact on the way in which others perceive us. Unlike many of our technical skills, the lessons of the workshop do not change over time. They are not affected by fashion or technology, so once learnt and practiced; they hold us in good stead for the rest of our lives (with a little refresher as we go).

The diversity of backgrounds and disciplines of participants attests to the broad relevance of the workshop – Information Systems, Finance, Project Management, Risk Management, Sales, Business Consulting, Account Management, Audit, Human Resources, Legal, Portfolio Management, Property Management, Procurement, Marketing, Software Development and Support, Media Production… the list just goes on. Some of these participants worked within the business and some external clients. The interesting thing is that despite the varied subject matter expertise and environments, the challenges facing these practitioners, at the point of client engagement, are remarkably similar.

# Acknowledgements

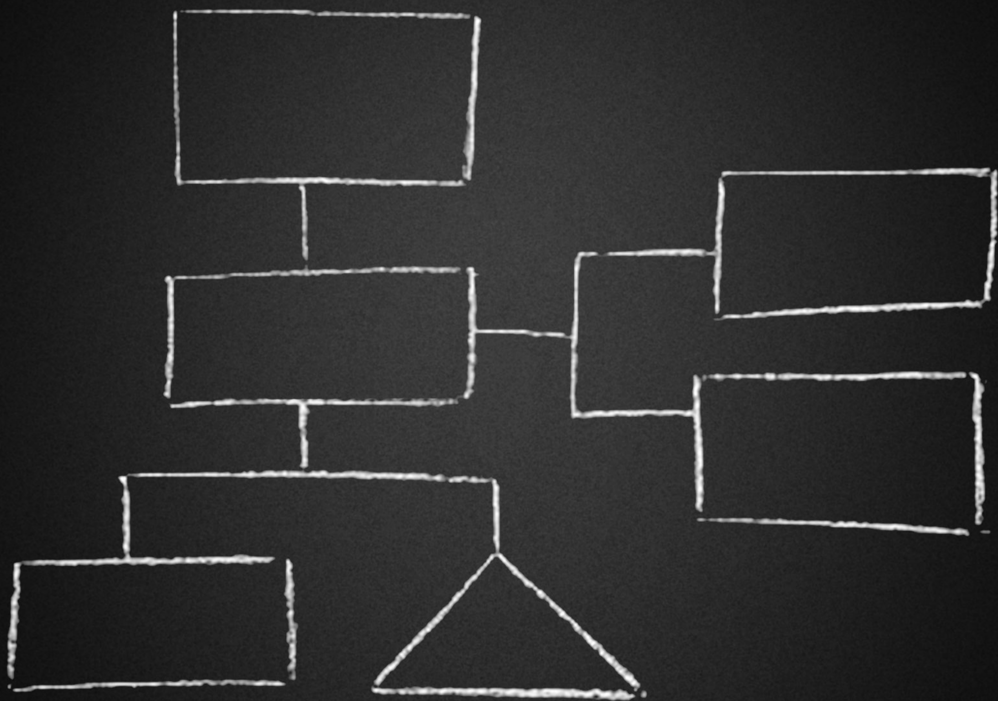
I would like to thank a number of people for their contribution to these chapters. First and foremost are my co-facilitators that have generated ideas and concepts, which have become part of the workshop and text – Ralph Muir-Morris, Bill Westerbeek and Trevor French.

From way back in the early days I would also like to acknowledge the help and input of Paul Chester, Neil Elliot, Glenn Linsley, Roz Rapke, Eric Mudge, David Parker and Tim Danielson in running those pioneer workshops.

Secondly I would like to thank the loyal clients that have helped the workshop prosper. The message has travelled primarily through word of mouth. In particular I would like to thank AGL, ANZ Bank, Australia Communications and Media Authority, Australia Post, Bankwest, BHP Billiton, Bio-Rad, CSIRO, Data Agility, Ernst and Young, Infosys, INVESCO, KPMG, National Australia Bank, Oxygen, QSP, RACV and Maximas, SAP, Telstra, TelstraClear (NZ), UXC, VicTrack, Worley Parsons and WTFN.

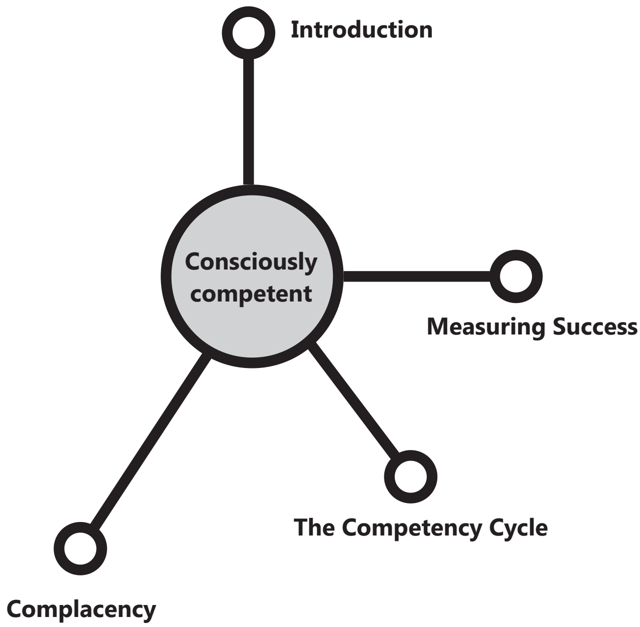
I also want to make mention of the Not for Profit organisations that we have donated workshop places to, including: Able Australia, Brotherhood of St. Lawrence, Canteen, Guide Dogs Victoria, Leukaemia Foundation, Planet Give, Royal Institute for Deaf and Blind Children, The Salvation Army, The Smith Family, Turning Point, Reach, RDNS, Vakabauta, Wildlife Victoria and World Vision.

Last, but certainly not least, I would like to thank the participants themselves. The success of every workshop has a lot to do with the standard of facilitation, and the attitude, openness and willingness of participants. I have been overwhelmed by the cooperation and energy of so many of the workshop attendees. I trust they will be happy when they recognise ideas or examples they may have contributed through workshop discussions.



# INTRODUCTION

Consciously competent


Introduction
Consciously competent
Measuring Success
The Competency Cycle
Complacency

# Introduction
## Consciously competent

I would argue that the major difference between the most successful consultants and the rest is not their ability to do things well, but their consistency in doing things well.

The problem for many consultants is that they do not seem to have a repeatable process for the simple things. An appropriate analogy is playing golf. Most ordinary golfers hit one shot every round that they would like to be able to bottle and re-play over and over. That shot was the equal of most professional golfers, but the difference is the professionals can repeat it every time, not just once every 18 holes! Professional golfers go through a set routine for every shot; correct grip, stance, addressing the ball, swings etc. Their goal is consistency and perfection. There should be a lesson here, for those of us in business. What elements should be in our routine of thought and preparation? What will help us be more consistently successful in our outcomes?

Many of us seem to be under too much pressure. Deadlines, e-mail, meetings and reports weigh us down and rob us of adequate time for thinking and preparation. But hang on a minute, when you do things consistently well don't we save ourselves time? Isn't this a case of 'more haste less speed'? Maybe it isn't that we don't have time to do things right, but that we just don't take the time to think about what our priorities should be. E-mail, Voicemail, Blackberry and others, have all helped us become more reactive than ever. We can be in constant contact with whoever wants to delegate or dump their stuff on us! The only way to survive is to clear our tasks as quickly as possible. Surely this reactive, task focus, is part of the issue.

Task focussed behaviour has been ingrained in us through our technical training, whether we are an accountant, IT specialist, lawyer, auditor, architect or whatever. The focus of our training is on the tasks we have to do. After all isn't that what we get paid for? As contentious as it may seem, technical skills and a task orientation will not, by themselves, produce consistently successful outcomes. The good work we do needs to be deployed to a 'client' and I am sure it will not have escaped you that clients are not all the same. That may be inconvenient, but the motto: "let's stick with the tasks, they are much more predictable", wont fix this variability.

When we start to focus on our client's needs, what might have appeared a repetitive task, turns out not to be. This is because the clients are different. Each client has his or her own priorities and needs. This can dramatically change what we should deliver to them.

***A proactive client focus rather than a reactive task focus will help us move from; 'Doing things right' to 'Doing the right things'.***

## Measuring success

Our success as business practitioners can be measured in a number of ways, but the client's perception is possibly the most important and enduring measurement. This perception tends to be based on both objective and subjective criteria.

Objective criteria include; conformance to budget, timeliness and quality. The subjective criteria are more about the overall experience. They do not always concur. I suspect we can all cite projects that were considered successful, even though not all the objectives were achieved. The client might have said, "It turned out to be more challenging that we expected, but we have made considerable progress". There may also be projects that were considered unsuccessful even though the criteria were all met. The client might have said, "They did what they said they would, but it wasn't what we really wanted!"

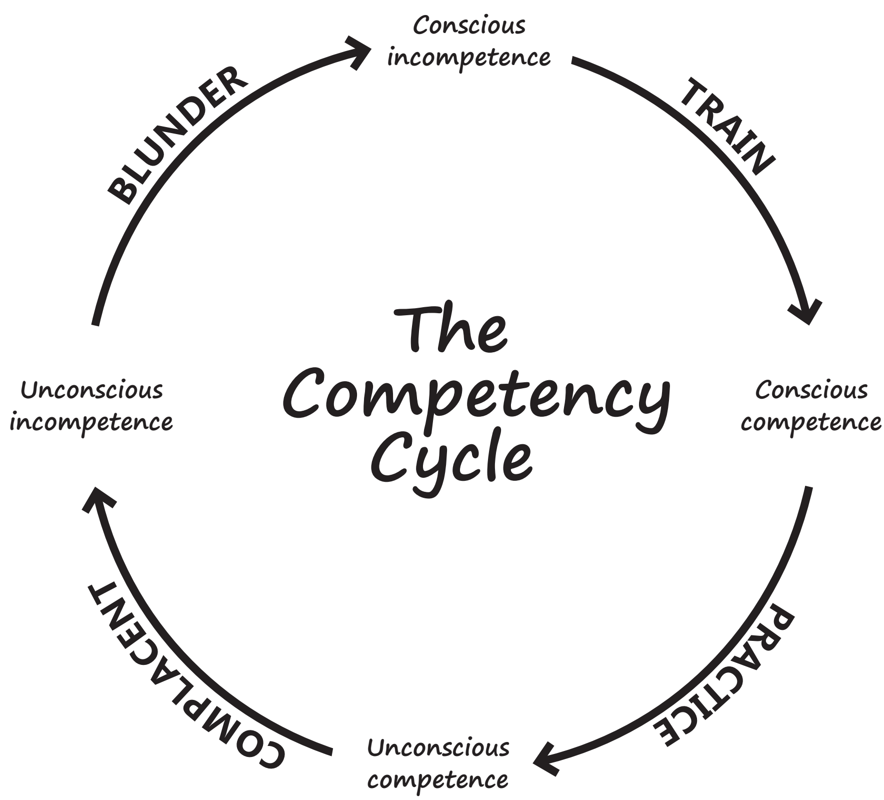
**To be consistently successful, in people based environments, we need to be competent in 3 areas:**

1. Subject Matter Expertise - For example: you will not be successful in an I.T. project without the appropriate skills in the team.
2. Process/Methodology - Repeatable processes that ensure consistency of result
3. Engagement Skills - Where the participants come together, there needs to be reasonable levels of cooperation, communication, respect, trust and goodwill.

All three are mandatory. An excess of one will not adequately compensate for a lacking in another. Many of us have experienced projects where, despite exceptional subject matter expertise and a sound approach, the end user feedback was under-whelming.

## The Competency Cycle

The competency cycle is a simple instrument that describes how we gain skills and competencies over time. We lose them if we fail to use them and keep them fresh. When we decide to learn a new skill we are consciously incompetent, in other words, we know we can't do it. Driving a car is a good example for most of us. As learners we trained and became consciously competent. We could drive, but the concentration was significant. With practice it becomes second nature and we could do it automatically. This is what we call "Unconscious Competence". Most routine things in our life are done this way. Unconscious competence is a good place to be, if we are truly competent. The danger is that complacency creeps in. Without good, behavioural feedback, we move around the curve toward the incompetent zone. The problem here is, that by definition, we are not thinking about what we are doing. We may believe we are operating competently, while in reality, we may not be. Every now and then it is worth setting aside some time to get back to Conscious Competence, to think about what we are doing, and whether there may be better ways. At least then we know we are Competent.

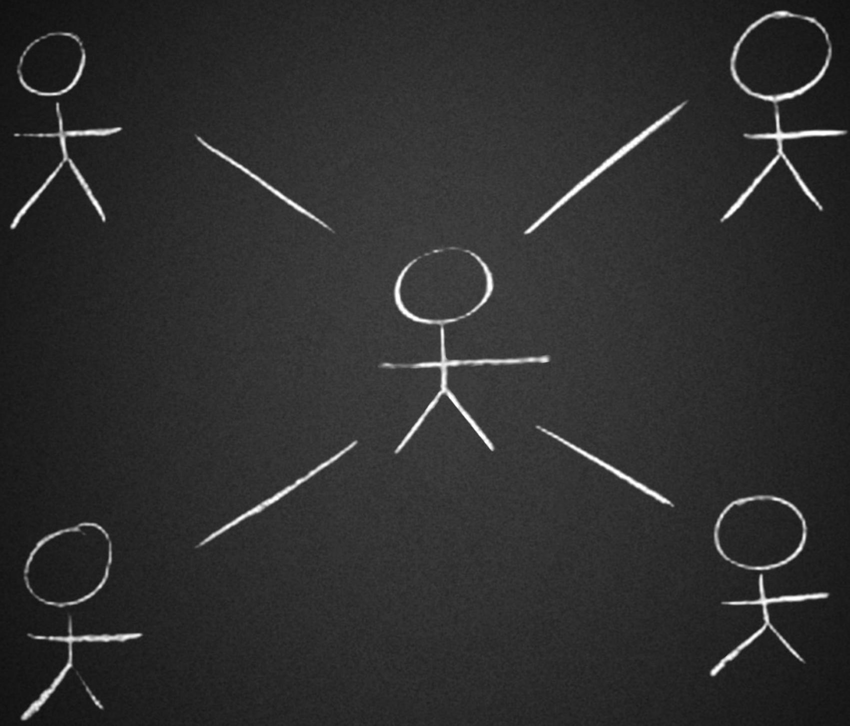


## Think!

We are not talking about analysis paralysis. To stop and think, if only for a few seconds, might be the difference between the auto-reaction (unconscious competence) and a considered response. It might be the difference between:

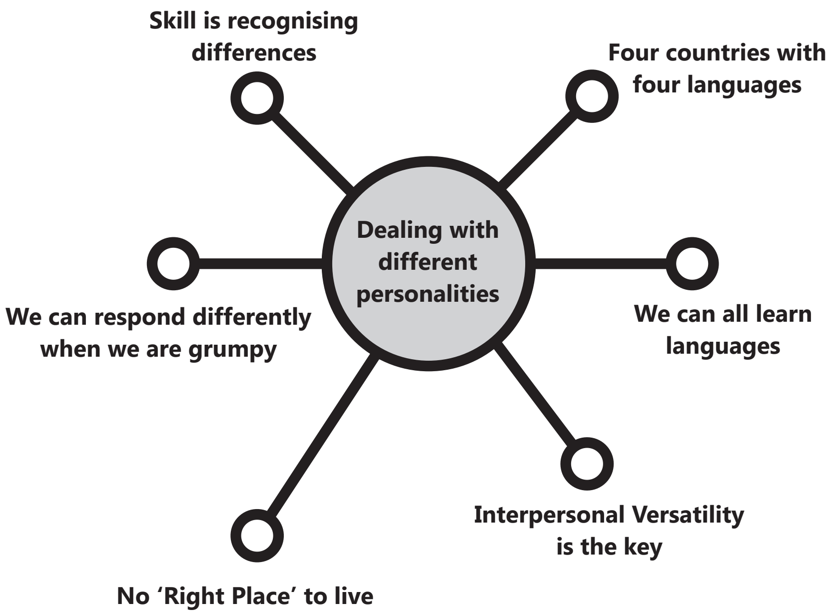
| **Conscious competence** | **Or** |
|---|---|
| Having a face to face meeting that seals the agreement required for a successful project, | Sending an e-mail that is misinterpreted and starts an e-mail war; |
| Using influence and winning the buy-in of staff | Using authority and causing resentment |
| Thinking through the objectives prior to a meeting. Considering potential objections and how they might be handled, resulting in a good meeting and a major step forward, | Going into the meeting under-prepared, and setting back the project (and your own credibility) by several weeks |
| Using authority to get a rapid and obvious resolution to an urgent issue, | Being seen as indecisive by canvassing multiple viewpoints on an issue that demands action now! |
| Declining a meeting invitation because there was no obvious point in you attending, and using that time to work on an important KPI, | Attending yet another boring and fruitless meeting. |
| Building valuable long term engagement with a key client, | Focusing on the transactional issues that are urgent now, but failing to cement the longer term relationship. |

Now before you say to yourself “I do most of those things anyway”, remember that we all do, when we consciously think about it. But we can all do that thinking more consistently. Replicate more frequently the good things we do and drive out the lapses that lead to sub-optimal outcomes. In other words Conscious Competence, not Unconscious Chance. Practice makes perfect - but only if its good practice! I have spent so many hours practicing my rotten golf swing that it is now a huge challenge to drive out the ugly bits. The most successful managers and practitioners practice thinking these issues through, so that they form good habits.



# CHAPTER ONE

## Dealing with Different Personalities


Skill is recognising differences
Four countries with four languages
Dealing with different personalities
We can respond differently when we are grumpy
We can all learn languages
Interpersonal Versatility is the key
No ‘Right Place’ to live

# Chapter One
## Dealing with Different Personalities

You may have noticed that not everybody is the same. Some people are interested in football, while others turn off as soon as the subject comes up. A joke that wins raucous laughter in one group may crash and burn in another group. Some of our clients and stakeholders are a dream to deal with whilst others, despite our best efforts, are more like a nightmare. Maybe there is something wrong with them! It surely couldn't be our fault? Generally it is not a case of right or wrong, but more a case of being different.
Around 400 B.C. Hippocrates noticed that, while people were different, many of them shared common characteristics. He divided the world into four prominent groups based on characteristics or clusters of behaviour, with each group having a particular way of expressing themselves, or of speaking their own "language". Since that time many prominent behaviourists have noticed something very similar. It would appear that each of us like to communicate predominantly in one of these "languages". This doesn't mean we don't have access to the other "languages" - we just have a preference.

This preferred "language" can often explain why, when we meet some people for the first time, we just seem to "click". There are others however, where we seem to almost go backwards. The third group lies somewhere in the middle. It is quite common to find that many of our close friends often share our preferred "language". It can also be true of our favourite customers or clients.

As we have discussed earlier in this book, strong working relationships enable us to be more efficient and more effective in our lives. When it comes to building rapport, common personality traits can put us "streets ahead" when dealing with people. Where we don't enjoy this advantage, we tend to speak our own "language" and expect to get by. This can mean living with the pain of a strained relationship. Experience would indicate that when we make the effort to adjust to the style of others, we build strong engagement.

## Seven Billion Personality Styles in Four Quadrants

There are around 7 billion people on this planet, each with a personality as unique as their fingerprints. To study and adjust to 7 billion different potential options is clearly too complex and time consuming to be useful. We should also bear in mind that this knowledge, of the fundamental differences between people, may be extremely useful and yet it doesn't answer every question. We also have to be aware of the cultural influences that overlay these preferences.

Fortunately it is not necessary to have a Ph.D. in human behaviour to succeed in this area. Instead we can adopt a simple Four Quadrant model where we can become familiar with the ”language” of each of the quadrant's.

**Behavioural Preferences Not Competencies**

It is important to stress that these quadrants are based on behavioural preferences and not on competencies. These preferences are neither good nor bad. Some people are naturally more detail-minded whilst others ”see” things in the “bigger picture”. Neither “view”, nor approach, is right or wrong. Both approaches add value and, whilst each might be better suited to different roles, an ability to communicate with each other, will result in greatly improve productivity.

The research is clear on one aspect of the Quadrants: success in life is not about which Quadrant you start from. Success in life, is about how adaptable you are with others and how many languages you can speak. Because of its simplicity, the Four Quadrant model can be a very effective tool. As long as we focus on the observable behaviour, and not the conclusions we might draw, we will be able to work constructively with all the people we come into contact with.

One obvious conclusion from all of this is that we need to be able to “speak” all Four Quadrant ”languages”. We also need to consciously, and competently, choose which ”language” to speak in front of different audiences.

## Four Different Countries

We may appear to speak the same "language" and yet the subtle differences are important. Let's divide mankind up geographically, according to their personalities. The people who live in the "North" will therefore share some common characteristics, as will the people in the "South". Looking at our population from a different perspective, we can see that the people in the "Western" hemispheres seem to understand each other, as do the people in the "East".

**The "North"**

Observing the people who live in the North, we will see that they like to take action. They are interested in leading and getting things done. The conversations tend to be quicker, and it is quite common for them to interrupt each other. The Northerners are usually higher risk takers than their Southern colleagues. Northerners tend to be more impatient, wanting to know the time, and not where the watch was made. Northerners are more likely to sacrifice quality to ensure deadlines are achieved.

**The "South"**

The Southerners, on the other hand, want to understand what's going on. They want to have enough information to make fully informed decisions. The process of learning and understanding is as important as the outcome. Southerners are comfortable asking questions and are intent on hearing the answer. They, therefore, tend not to interrupt. If they do, they will generally apologise. They tend to be risk assessing, trying to ensure that they don't make mistakes. Southerners are more likely to sacrifice the deadline in the name of a quality solution.

**The "West"**

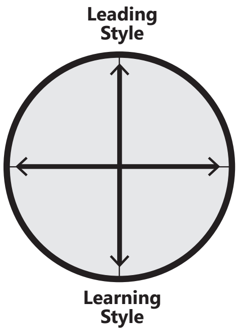
Looking at the population inhabiting the Western hemisphere we will see that they are predominantly task-focussed individuals. They like to work out problems in a logical fashion. Westerners tend to separate "work from "home". They are happy to socialise after they have dealt with the business issues, but not generally before. Westerners endeavour to avoid displaying emotion, although they are often as caring and concerned as any other individual. They will look to give practical help when people are in need. Westerners are more likely to sacrifice the individual's feelings in order to achieve the task.

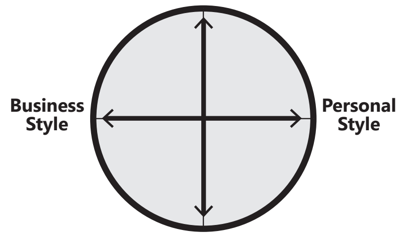
**The "East"**

Easterners are concerned with the individual and will show this right from a first meeting. Building positive relationships is an important part of their life. Easterners tend to be naturally empathetic. Easterners are comfortable talking about how the "feel". They don't have to be told that somebody is unhappy, as they are able to sense it. Easterners don't distinguish between home and work to the degree that their Western colleagues do. They often leverage the networks of people they have established. Easterners are more likely to sacrifice the "task" to maintain good relationships.

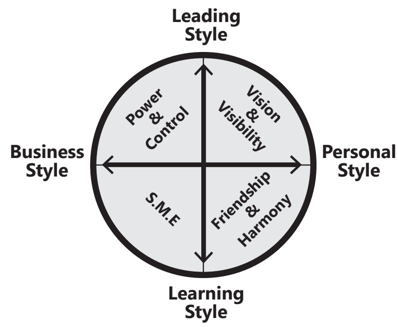
# The "Quadrants"

When we establish that somebody is either from:
the North or South, or from the East or West,




we are able to establish which country or "quadrant" they belong to, as each quadrant has a specific theme to it. The end result is four quadrants of behavioural preference. We have given them titles that refer to an unquenchable thirst that is often found within these groups.




**Power & Control**

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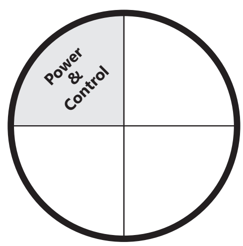
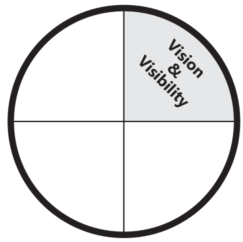


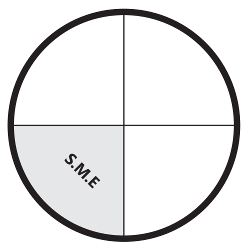

**Manner:** Serious, decisive, lets one know what is wanted.
**Behaviour:** Formal posture. Direct approach. Power handshake.
**Visual clues:** Tends to lean forward to make a point. Intense eyes. Expressions are obvious, gestures restrained. Power dressed.
**Verbal clues:** Quick, clear, or fast paced. Emphasises ideas by tone change. Makes task focussed statements more often than asks questions.
**Attributes:** Decisive, efficient, concise, takes charge, results focused.
**Important to them:** Time & timeliness. Getting to the point early. Timely, succinct feedback. Efficiency. What solution will be provided.
**Irritating to them:** Fuzzy objectives; excuses; going over past history. Inflexibility.
**Irritating about them:** Can be insensitive and pushy. Interrupts and talks over others. Can be too impatient. Can switch off and stop listening to others when it doesn't interest them.

**Vision & Visibility**



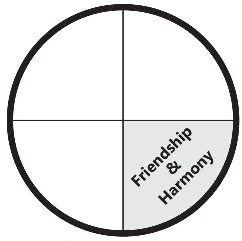

**Manner:** Animated, uses facial expressions.
**Behaviour:** Energetic. Enthusiastic. Open or eager.
**Visual clues:** Friendly gaze/eye contact. Hand gestures, palms up, open.
**Verbal clues:** Variation in voice. Fast paced and leads by "telling". Shares personal feelings. Tells stories, makes small talk. Likes to tell jokes. Limited expressions of facts.
**Attributes:** Open, enthusiastic, energetic, futuristic, generates excitement.
**Important to them:** Other people. To receive visibility for the value they bring. To be admired.
**Irritating to them:** Lack of affirmation from others. Avoidance of eye-contact. Getting less than 50% - 70% of the conversation.
**Irritating about them:** Can talk too much. Like to be the centre of attention. Can appear superficial. Shoots from the hip. Easily distracted. Often not punctual (their time seems more important than your time).

**Subject Matter Expert**



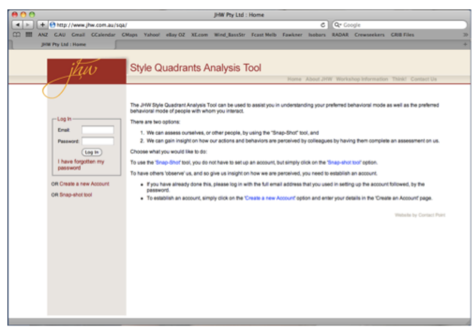

**Manner**: Reserved, withheld, slower to respond.
**Behaviour**: Actions controlled or careful. Few gestures. Self-contained, Discusses everything logically.
**Visual clues:** Eyes serious. Few gestures. Functional appearance.
**Verbal clues:** Proper and slower rate of speech. Tends to look for protagonist to lead and responds with questions. Wants facts and details. Shares information about task. Tends not to display personal feelings, tell stories, or engage in small talk.
**Attributes:** Practical, orderly, thorough, maintains standards.
**Important to them:** Thoroughness and accuracy. Evaluating all options. Being right. How problem will be solved.
**Irritating to them:** Lack of facts and preparation. Being wrong. Sudden changes in the planned approach or direction.
**Irritating about them:** Delving into too much detail. Limited eye-contact. Slow pace of dialogue. Length of pauses before responding. Proving they're right.

## Friendship & Harmony




**Manner:** Expressions and posture are quiet and non-intrusive.
**Behaviour:** Friendly. Seldom raises voice to emphasise ideas. Responds rather than leads.
**Visual clues:** Tends not to lean forwards when in conversation. Maintains good and friendly or concerned eye contact.
**Verbal clues:** Quiet, deliberate, studied, slower in speech and response. Asks questions more often than making statements. Does not interrupt or talk over others.
**Attributes:** Patient, supportive, listener, cooperates, team-worker.
Important to them: Time to establish the relationship. Finding commonality. Obtaining consensus. Why solution is best for the group.
**Irritating to them:** Being interrupted and talked over. Not given sufficient pause to respond. Lack of manners and courtesy from others
**Irritating about them:** Can be too compliant. Not driven enough. Not sufficiently task focussed. Not sufficiently time focussed.

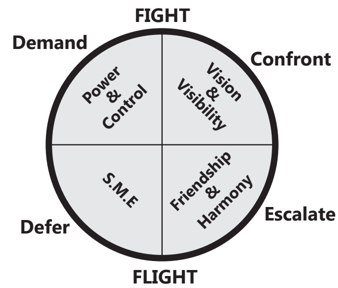
## JHW Style Quadrant Tool




If you wish to take a more methodic approach, you can use the JHW Style Quadrant Analysis at **http://www.jhw.com.au/sqa/**
The “Snap-shot tool” on the web-page allows you to select and click words that best describe a person whom you wish to understand. The tool will then display a graph of the Style Preferences you have described. For privacy and security reasons no data is stored in the system, so to keep the results you will need to take a screen print of the information that you wish to keep.
The system allows you to observe yourself, if you wish, but we have found that most people are not the best observers of their own behaviour (we tend to be in danger of believing our own propaganda!) A better option is to get other people to observe you. This is far better done anonymously, so rather than use the snap-shot tool you may wish to use the system’s more sophisticated tool that requires you to set up an account from which you can invite multiple observers to submit their view of you. The tool will compile these and provide you with a composite report, preserving both the anonymity of the observers individual comments, and protecting your profile from unauthorised access. Follow the instructions on the web pages to do this assessment. The results will be stored on the account that you create and will allow you to repeat the exercise with different groups of observers (eg. business associates, social acquaintances, clients, peers, subordinates etc).

## Dealing with Different Styles When they get Grumpy

How people respond to stress is a fairly strong indicator of which quadrant they prefer. We all tend to respond in a predictable fashion, as we get angrier.

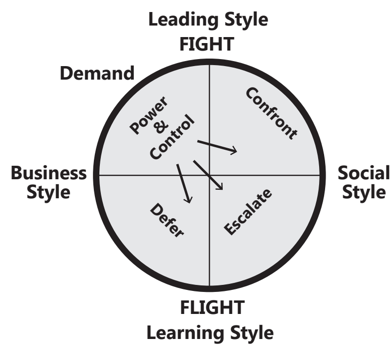



If we are from the **North**, our first response tends to be down the “Fight” path. We’re comfortable telling people what we think or how we feel about the situation. Our interest is in fixing whatever is broken and moving forward. We are not as interested in the history surrounding the situation.

If we’re from the **South**, our first response tends to be down the “Flight” path. We tend only to be comfortable when we have all the information at hand. As a result we will often avoid discussing the issue initially. We are just as interested in what can be learned from the mistake or situation, as the solution we eventually arrive at.

## Power & Control

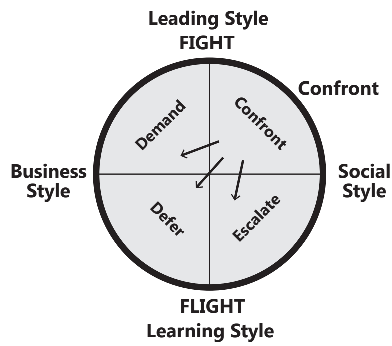
The normal first line response from this quadrant is to increase the focus on completing the task. This will normally be interpreted as a demand. While some listeners may interpret the message as aggressive, it is unlikely to be personal in nature. The second line response will be along the North/South continuum. The subject will be avoided in the hope that something will happen.




The third line response will be a long the West/East continuum. The subject will be confronted in a more personal manner. Blame will often be assigned. The fourth line response will be across the diagonal. Control for the situation will be handed to somebody else. When a Power and Control person gives over their power, it is a strong indication of high stress.

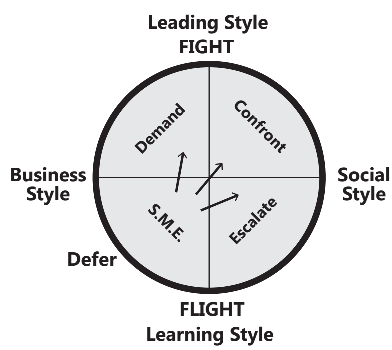
**Vision & Visibility**

The normal first line response from this quadrant is to increase the focus on individuals involved in the task. This will normally be interpreted as confrontation. While some listeners may interpret the message as irrational, it is likely to be personal in nature. The second line response will be along the North/South continuum. Control for the situation may well be handed to somebody else. Alternatively blame will be attributed somewhere else to avoid direct prolonged discussion.
The third line response will be a long the West/East continuum. The focus will be on completing the task. This will normally be interpreted as a demand. The fourth line response will be across the diagonal. The subject will be avoided in the hope that something will happen. When a Vision and Visibility person stops communicating with you, it is a strong indication of high stress



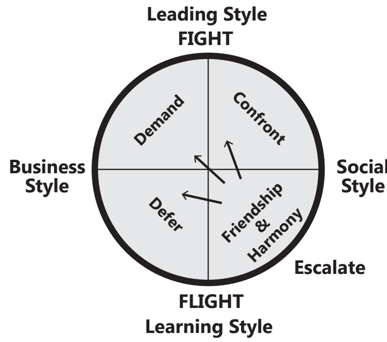

**Subject Matter Expert**

The normal first line response from this quadrant is to avoid the topic in the hope that something will happen. This will normally be interpreted as vagueness or unwillingness to be involved. The second line response will be along the North/South continuum. The focus will be on completing the task. This will normally be interpreted as a demand. The third line response will be a long the West/ East continuum. Control for the situation will be handed to somebody else. The fourth line response will be across the diagonal. The subject will be confronted in a more personal manner. Blame will often be assigned. When a Subject Matter Expert appears to be angry and irrational, it is a strong indication of high stress.



### Friendship & Harmony

The normal first line response from this quadrant is to hand control for the situation to somebody else. Alternatively, blame will be attributed somewhere else to avoid direct confrontation. This will normally be interpreted as being escalation. Friendship and Harmony individuals are very interested in maintaining their relationships.

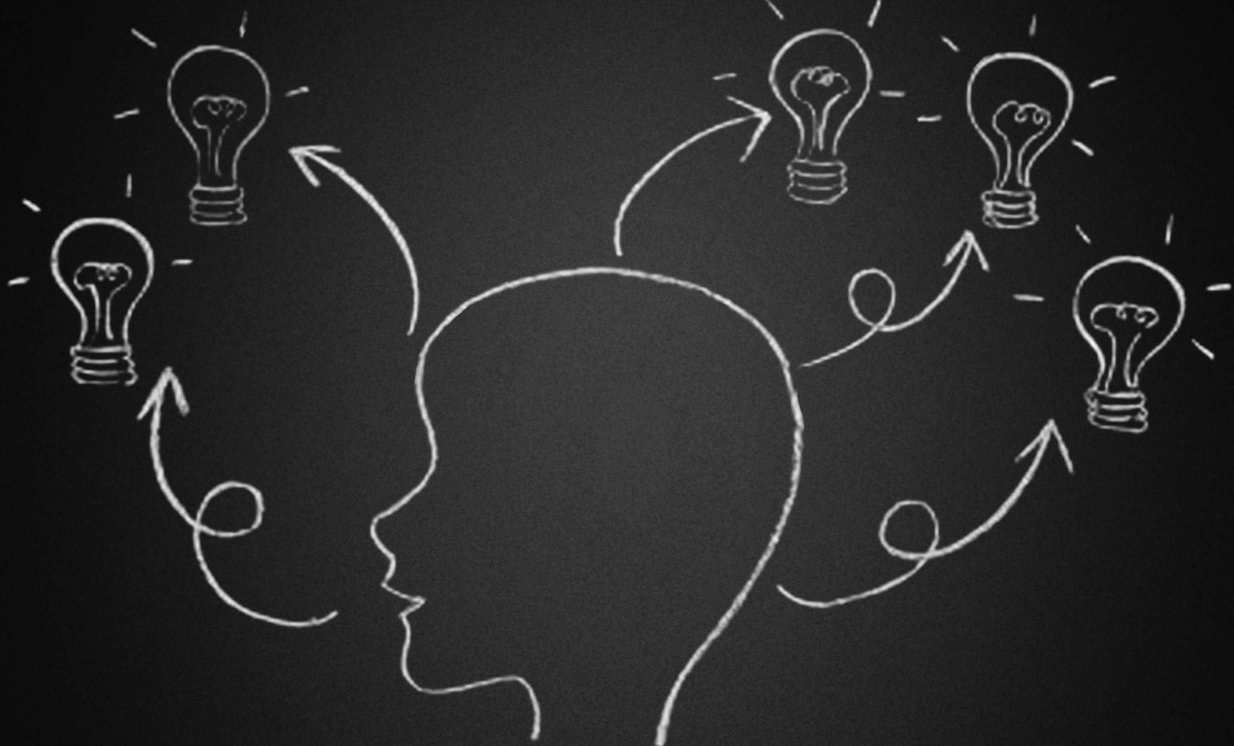



The second line response will be along the North/South continuum. The subject will be confronted in a more personal manner. Blame will often be assigned.
The third line response will be along the West/East continuum. The subject will be avoided in the hope that something will happen.
The fourth line response will be across the diagonal. The focus will be on completing the task. This will normally be interpreted as a demand. When a Friendship and Harmony individual communicates impersonally, it is a strong indication of high stress.

### Conclusion

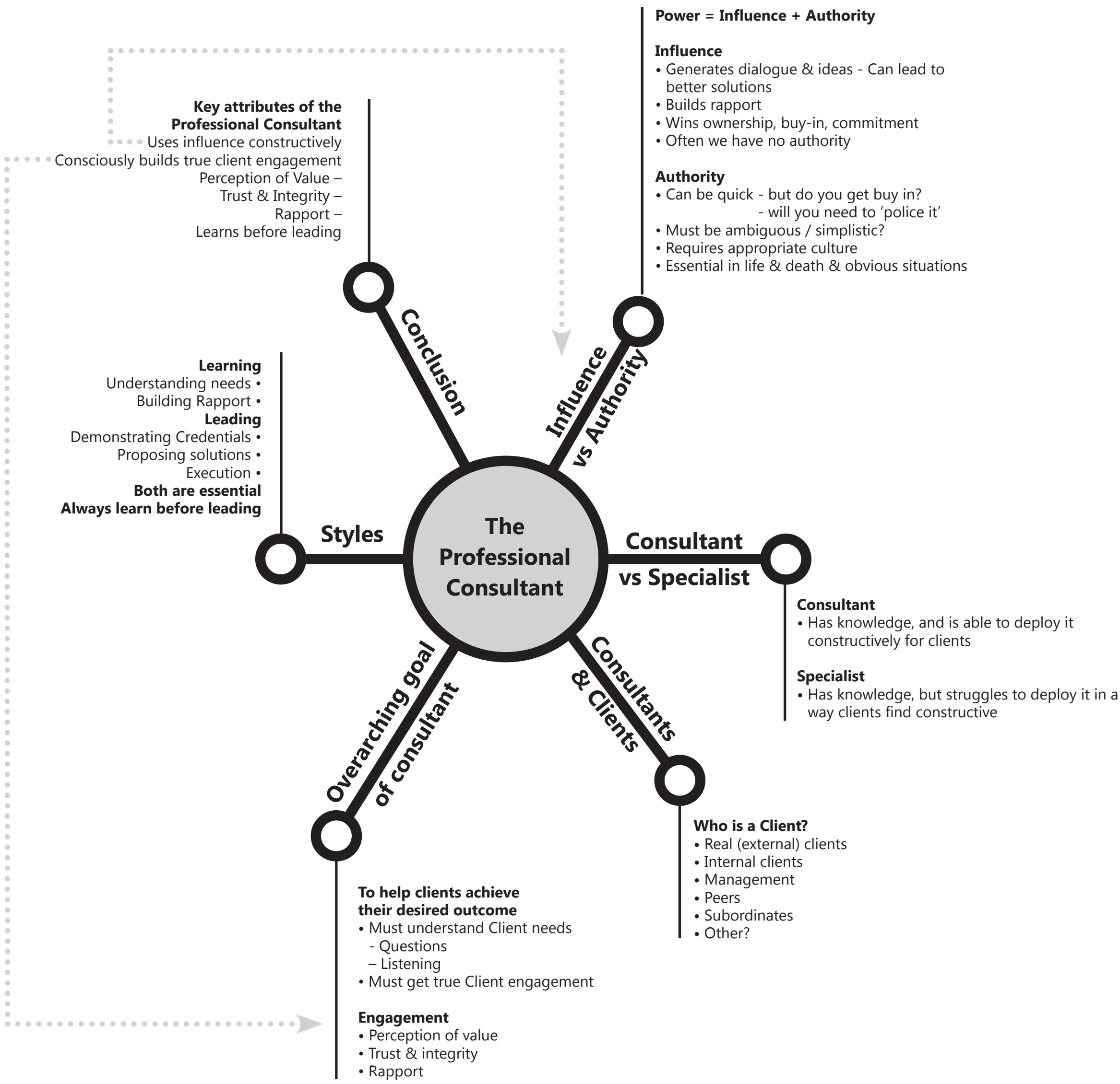
Individuals who live in the Eastern quadrants intuitively understand the difference between the quadrants. Those who live in the Western quadrants can often be dismissive of the need for rapport building. The research is quite clear however. People who make an effort to speak to other people, in the appropriate “language”, are more successful than those who don’t. So it doesn’t matter which quadrant you belong to as long as you learn to speak a little of the other three “languages”.

There are very few people in the workplace who have no positive business relationships. It is possible for all of us to engage meaningfully with all the people we encounter in life. We have the chance to make every client our supporter and friend. The numbers are fairly compelling. If we only speak our “language”, we will productively engage 25% of the possible audience. If we identify when people are different to us, and make the effort to speak their “language”, we can engage with 100%.



# CHAPTER TWO

## The Professional Consultant



The Professional Consultant
Conclusion
Influence vs Authority
Consultant vs Specialist
Consultants & Clients
Overarching goal of consultant
Styles
Power = Influence + Authority
Influence
• Generates dialogue & ideas - Can lead to better solutions
• Builds rapport
• Wins ownership, buy-in, commitment
• Often we have no authority
Authority
• Can be quick - but do you get buy in?
- will you need to 'police it'
• Must be ambiguous / simplistic?
• Requires appropriate culture
• Essential in life & death & obvious situations
Key attributes of the Professional Consultant
Uses influence constructively
Consciously builds true client engagement
Perception of Value –
Trust & Integrity –
Rapport –
Learns before leading
Learning
Understanding needs •
Building Rapport •
Leading
Demonstrating Credentials •
Proposing solutions •
Execution •
Both are essential
Always learn before leading
Consultant
• Has knowledge, and is able to deploy it constructively for clients
Specialist
• Has knowledge, but struggles to deploy it in a way clients find constructive
Who is a Client?
• Real (external) clients
• Internal clients
• Management
• Peers
• Subordinates
• Other?
To help clients achieve their desired outcome
• Must understand Client needs
- Questions
– Listening
• Must get true Client engagement
Engagement
• Perception of value
• Trust & integrity
• Rapport

# Chapter Two
## The Professional Consultant

**What is a Consultant?**
The meaning of the term Consultant has changed over time. With the expansion of out-sourcing has come an explosion of external 'consultants', to the extent that we now tend to think of a consultant as the external specialist, paid on an hourly or daily basis. This in fact more accurately describes a 'contractor'. For the purpose of this chapter I would like to take a broader view of the term Consultant.

The general requirements to qualify as a consultant usually include:

- One who helps clients to solve problems and/or exploit opportunities
- The ability to provide advice to a client: Advisor (not necessarily doer)
- Possessing specialist expertise, which is in demand

Using this definition, a consultant can be either external to the clients organisation or an internal appointment. Whilst specialist expertise is important, it is not sufficient alone. A specialist may possess skills and knowledge in demand, but if this person lacks the skills and/or client focus to deploy their expertise in a way useful to the client, then they will not succeed as a consultant. The specialist however is likely to have a vital role to play in supporting consultants in the provision of services to their clients. As a consultant you require a client focus and the skills to deal with clients in a meaningful way.

***How you are viewed, has more to do with the way in which you operate than the actual job you do.***

**Authority vs Influence**
If your objective is to achieve outcomes working with other people, you have two choices: Authority (you can tell them) or Influence (you can persuade them).

| **Authority** | **Influence** |
|---|---|
| Can achieve outcomes faster | Wins buy-in and ownership |
| Must be unambiguous | Greater likelihood of commitment |
| Needs to be kept simple; simplistic | Generates dialogue and ideas |
| Effective with critical issues | Can result in a better solution |
| Outcomes may need to be policed | Builds rapport |

Of course you often do not have the necessary authority, so your only option is influence. Even when you do have authority, you may choose to use influence in order to achieve a better outcome – you do not forego your authority just because you elect not to use it initially. Being a consultant implies you primarily operate using influence. In the context of this chapter, the term Consultant relates to how you do your job – not what your job is.

**The Skills of the Professional Consultant**

In workshop discussion groups, when we look at the role of the consultant, it is quickly established that the key attribute is 'to use your specialist knowledge to help your clients solve problems or exploit opportunities'. Similar to what we were told in school at exam time – "Just answer the question". However you face an additional challenge – you first need to establish "What is the question?"

You cannot 'consult' with your client unless you understand their needs and challenges. If your role is to provide solutions, you must understand that a solution cannot exist without needs. To determine the client's needs you must ask questions.

***Questions are the most important tool of the consultant.***

Questions not only help you to understand the client's needs, but they also demonstrate that you care about their situation. One participant on a workshop in China suggested:

***"The client doesn't care how much we know until they know how much we care"***

I guess this makes it a contemporary Chinese Proverb! The client is seeking concise answers to their business issues drawn from your specialist knowledge. This demands that as a consultant you take the time to understand these issues.

If questions are the most important tool of the consultant, listening is the essential skill to compliment them. Listening is one of the most difficult business skills. If you doubt that, ask yourself how many times you have been introduced to someone, and whilst you are still shaking their hand you realise that you have already forgotten their name!

If you accept the need for consultants to ask questions and listen, you also need to understand why clients should take the time to answer your questions. The obvious point is that unless you understand the client's needs you cannot help them. That is actually your problem not the client's. The fact of life is that clients are extremely busy, and the information that you require can be very sensitive, so there are a number of reasons why clients may be reluctant to share this essential information with you. If you have true engagement with your client, they will be prepared to share vital information with you.

True engagement is only achieved by establishing three essential attributes:

- Rapport
- Trust / Integrity
- A perception that you can add Value

If you achieve these, you will establish engagement with your client. This is probably more important than any single business transaction – the relationship transcends any single opportunity, and you should consciously strive to build these three points at every touch-point with your clients.

**Building Rapport**
Corporations do not buy from corporations, nor does one internal division of an organisation deal with another division.

Whilst you may be addressing the needs of a corporation or division, you must still understand the dynamics of the people involved. If you can build a robust relationship with your client, it will enhance the sharing of information, and build a level of forgiveness for when (not if) things go wrong. It will buy you greater access to your client, and the vital information you require. When you have rapport with your client, their frame of mind is positive – the same meeting, without that rapport tends to attract more scepticism. The techniques for building rapport are known to all of us – you do it all the time socially - but they are often overlooked in a business relationship.

These techniques include;

- Finding common interests
- Asking questions – taking an interest in the person; people like to talk about themselves, their job, their importance and their interests
- Listening and demonstrating that you have listened
- Demonstrating integrity and value (see below)
- Getting out of the office environment – perhaps a coffee or lunch; many people lighten up when they get out of their business surroundings
- Giving a little – without becoming too self-centric, it pays to share a little of your own background and interests, rather than making the meeting a one way interrogation
- Humour can be a good / great rapport builder with some people, but it does carry risks – it can make you appear a little shallow to some. Good humour is usually spontaneous, so it doesn't give you a chance to think about the consequences. Who has never experienced the 'funny line' that went wrong – greeted with deathly silence?

**Demonstrating Trust & Integrity**
Few people want to deal with people they do not trust. However, trust and integrity can take time to establish. It is a slow process that builds on demonstrable experience, so you need to introduce or be given the chance to demonstrate you are trustworthy. Once you have done so, more opportunities will be forthcoming, because the client has started to trust you – a self-reinforcing positive feedback loop.

Key points in your dealing with your clients include;

- Always being honest
- Being open
- Admitting when you don't know something, but committing to get back with the answer

- Exceeding expectations - this has more to do with setting reasonable expectations than doing hard yards in delivery

One technique that will help accelerate this process is to take an action during an initial meeting with a client. Contrive one if necessary, maybe it relates to a personal rather than business matter. Set an expectation for completion of the action, and then exceed that expectation. You will have started to demonstrate that you can be relied upon, trusted, and the result will be that the client will be prepared to trust you with a larger, more important task from which you can earn greater credibility.

**Demonstrating a potential to add value**
No business client these days has time to deal with people who offer little chance of adding value. They are all far too busy. Actually telling a client how valuable you can be usually won't cut it either. Firstly it doesn't sound all that convincing to the client, and secondly, most of us don't feel too comfortable blowing our own trumpet.

Insightful, probing questions about the client's business imperatives will tell the client a great deal more about your credentials. Referencing previous work you have carried out can also be useful. Over time you are looking to build a reputation or 'brand name' for yourself that is well recognised in your marketplace as an indication of value!

**Consciously building engagement**
If you have experienced a situation where you have had difficulty establishing a dialogue or getting the information you require from a client, chances are that one of these three elements are missing. The best practitioners consciously set about building Rapport, Trust & Integrity and Perception of Value at the outset of a relationship. They then continue to do so, at every touch-point.

**Learning & Leading**
There are two styles of consulting, both are essential, but it is important to use them appropriately.

- **Learning** – Most of what has been discussed above; understanding your client's needs, challenges and environment, building rapport, integrity etc.

- **Leading** – Using your specialist expertise to take your client forward, taking them beyond their current horizons, taking off their blinkers, and demonstrating that you can provide value.

### *You must start with learning!*

If you start with leading you will be in danger of being perceived as selling a stock solution or having a prior agenda. It can even come across as arrogant, or that you have insufficient experience to realise you must understand the needs before you can provide a solution!

Even if you already understand the needs of your client, maybe from another source, it is still important to go through the process of learning from your client. It is part of building rapport and proving you care. Your alternative source may not be up to date, or may simply have a different perspective on the situation from the client. As a consultant you deal in solutions and therefore must demonstrate you understand the needs before you start leading.

## *Leading is also essential*

If you only learn, the client is likely to decide that you have little value to add thus limiting your opportunities. But leading is fraught with danger. If you lead badly you can demonstrate a poor understanding of client needs, or again be perceived as having our own agenda.

Key lessons for good leading include:

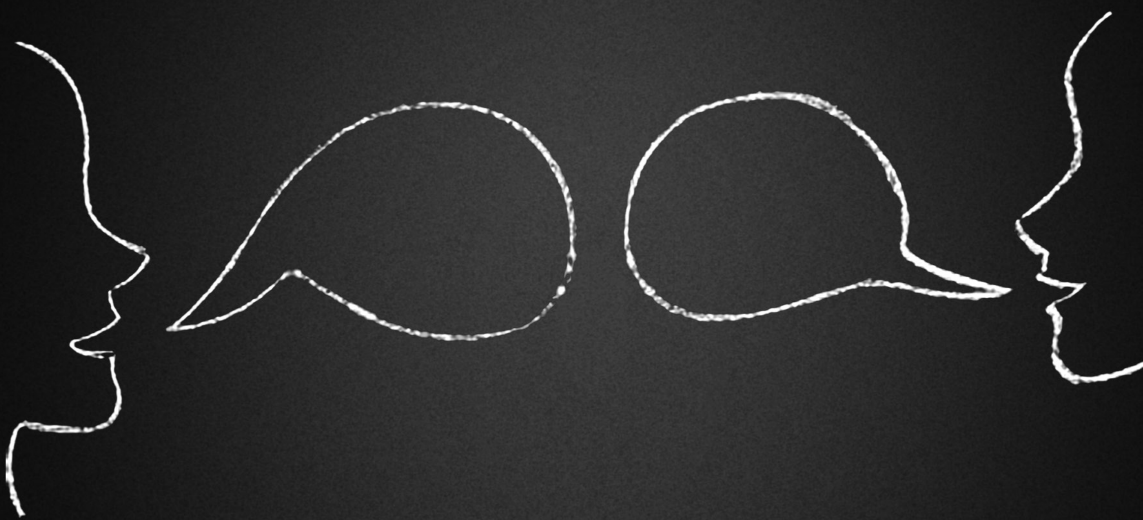
- **Lead with questions:** For example: "Would it be useful, Mr. Client, to go beyond your current scope and use this latest technical development to achieve XYZ as well?" If the answer is "No", you have lost nothing and learned something. However had you had phrased it as a statement, "You should use this latest technology to achieve XYZ", you have left yourself open to being wrong, and possibly being perceived as having your own agenda. The client is likely to think "Does this consultant simply want an opportunity to play with the latest technology at my cost?"

- **Lead with examples:** Rather than simply claiming that you can solve the client's needs, find a relevant example of where you have done a similar job before. This is far more convincing than "I'm Good, Just Ask Me!", and it provides solid evidence.

- **Lead with direct relevance to the client's needs:** You are there to address the client needs, not go off on your own agenda.

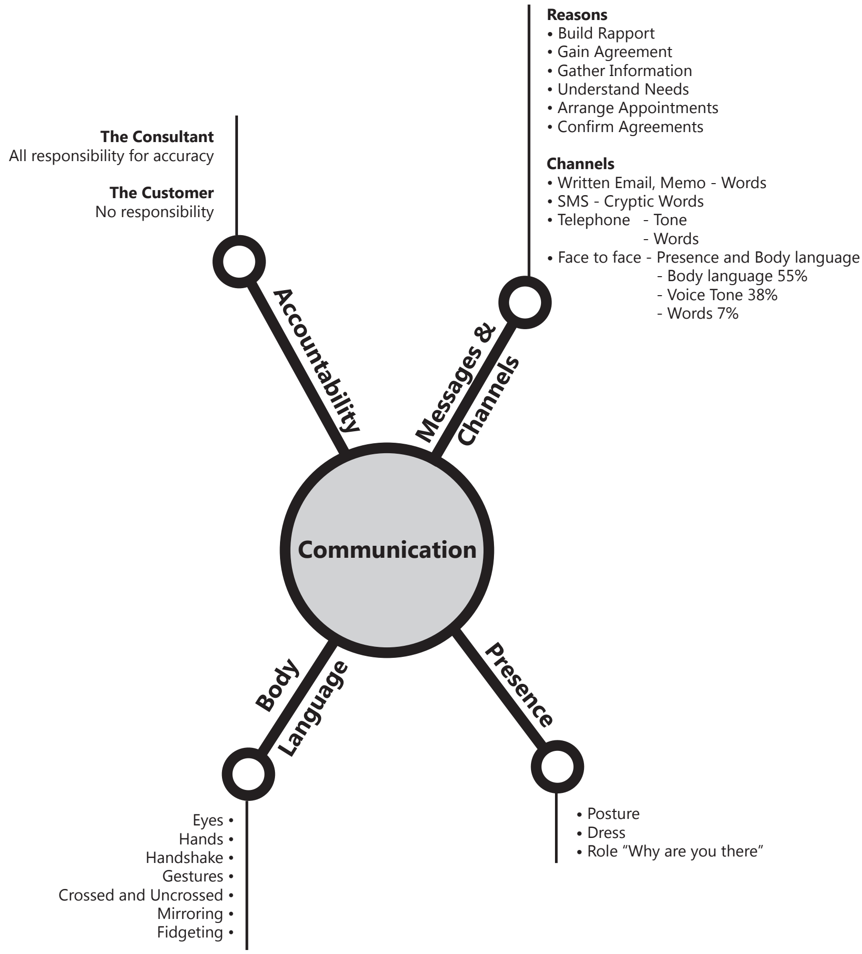
**Conclusion**

To summarise, the key attributes of the professional consultant are;
- Consciously and competently uses Influence
- Constructively builds Engagement –
    - Trust & Integrity
    - Perception of Value
    - Rapport
- Learns before Leading



# CHAPTER THREE

## Communication - A thought starter


Communication
Accountability
The Consultant
All responsibility for accuracy
The Customer
No responsibility
Messages & Channels
Reasons
• Build Rapport
• Gain Agreement
• Gather Information
• Understand Needs
• Arrange Appointments
• Confirm Agreements
Channels
• Written Email, Memo - Words
• SMS - Cryptic Words
• Telephone - Tone
- Words
• Face to face - Presence and Body language
- Body language 55%
- Voice Tone 38%
- Words 7%
Body Language
Eyes •
Hands •
Handshake •
Gestures •
Crossed and Uncrossed •
Mirroring •
Fidgeting •
Presence
• Posture
• Dress
• Role “Why are you there”

# Chapter Three
## Communication - A thought starter

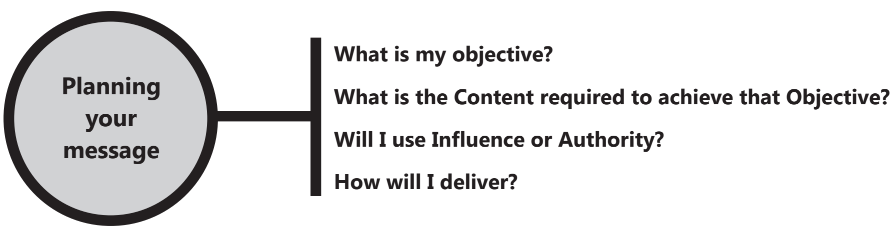
**The Communication Process**

The practice of communication is often only a partially considered activity. Few people have the time, or the opportunity, to consider all aspects of what they have to say, how to phrase their message or the timing and form of the communication. Most people have, at times in their lives, felt annoyance at some aspect of communication with a manager, a colleague, family member or even a friend. Yet if the communication is broken down to the single central theme or message, few would question the need for that communication. What we might question however, was the method or form of the communication.

### *'It's not what you say; it's how you say it'*

As communicators, the deliverers of messages, we have all become so familiar with the techniques of communication, that we don't really think about it. Therein lies the problem. The assumption is we have achieved 'Unconscious Competence' (I can do this effectively without thinking about it), when in fact we are often 'Unconsciously Incompetent' (I don't need to think about this to get it wrong!). This may seem harsh, but how many times have we experienced a disappointing outcome to a seemingly simple communication? What we must do first is move to 'Conscious Competence' (I can improve my effectiveness if I review what I have been doing).

There is a need to consciously consider, even if only briefly in simple cases, the method we propose to use to communicate and the expected effect of the form chosen on the target recipient. To do this we need to think about the elements of communication and attempt to understand the potential impact on the receiver of our communication. A simple model might be:




This may seem over engineered for a simple communication such as "Will you make me a cup of tea?", but as soon as we get into more complex and delicate topics, thinking about the delivery can mean the difference between an optimal and a poor or even negative outcome. The best professional communicators do consciously think about these issues, and once you start to practice, it rapidly becomes habit ('Conscious Competence' – I can do this effectively if I think about it). In the majority of cases it actually only takes a few seconds!

**Objective(s)**

### *What is the desired outcome of the communication?*

Are you seeking Action, Agreement, Commitment, or are you just passing on Knowledge or Information? Are you intending to strengthen the relationship as part of the communication? Whatever the objective, how will you know if you have succeeded? Often when we become complacent about communication, we lose sight of the objective. When this happens the communication can become long winded, head off on frequent diversions and fail to end up with any tangible conclusions (think of two drunks solving the problems of the world). If we start by thinking about the objective of the communication, the message becomes much sharper, and we stand a much better chance of success.

**Content**

### *What needs to be said or written in order to achieve the objective?*

The content becomes far more concise and crisp once we consider it in the context of the objective we hope to achieve. Think about the time you have wasted in rambling presentations or meetings that didn't seem to go anywhere.

**Authority or Influence**

### *Have you authority or must you use influence to achieve the objective?*

In order to achieve the objective, are you going to 'tell' what you want done, or are you going to try to 'persuade' and get some buy-in? This will depend on a number of factors including:

- Do you have authority?
- What is the urgency?
- How complex is it?
- Do you want to build buy-in?
- Are you prepared to debate it?

Most of us make this decision unconsciously fifty or more times a day, on minor and major issues, and often it works fine (Unconscious Competence), but frequently it does not (Unconscious Incompetence). This is the problem with leaving it to chance. We might describe it as instinct, intuition or flair when it succeeds. It is otherwise referred to as incompetence, laziness, maverick approach, or just plain dumb when it goes wrong. Unfortunately, it is not immediately obvious to us that failure or resistance, was due to a lack of planning or inappropriate use of Authority or Influence. People rarely provide us with feedback like:

- “I didn’t feel motivated to do what you requested, because I did not appreciate the way you asked” or
- “I did not agree with the urgency you placed upon this task”

But that may be the root cause to resistance, and it is more difficult to resolve when we don’t identify it correctly. Most of us can think of occasions when we have failed to buy-in, and possibly under-performed, due to the way the message was delivered.

**Delivery**
What is the most appropriate channel to deliver the message?
There are a limited number of channels available to you when communicating. These can be grouped as follows:

- Face to face - All parties are in the same place and in direct contact with one another (e.g. a meeting).
- Voice - All parties are in contact with one another but not in the same place (e.g. telephone).
- Messaging - All parties communicate using a text/words only. There are longer pauses between input and no tone of voice (e.g. messenger or same time).
- Word - One party communicates with others without real time contact (e.g. email, memo, letter).
- Text - One party communicates using a short cryptic message. Text differs from word only in the structure, lack of detail and expedience of the communication (e.g. SMS).

The use of communications in business is usually associated with one or more of the following:

- Building relationships or rapport
- Understanding needs
- Gathering knowledge or information
- Disseminating knowledge or information
- Requesting action
- Gaining agreement / commitment
- Confirming agreements
- Arranging appointments

Not all channels suit all reasons to communicate. Choosing the wrong channel for the communication is what most disappoints and annoys the receiver. Email wars that end up involving many people in the office are likely to be a result of the inappropriate use of this channel for a perfectly legitimate message. Some will argue that the content caused the problem, and in many instances the content does inflame the situation, but of itself is less likely than the channel to set the war in motion. Content poorly presented face to face can, in most instances, be corrected at the time. Written words poorly presented leave a festering sore until the issue is resolved.

## When do you use a particular channel?

The table below gives some insight.

| | Channel | | | |
|---|---|---|---|---|
| Requirement | Face to Face | Voice | Word | Text |
| Building relationships or rapport | ✓✓ | ✓ | | |
| Understanding needs | ✓✓ | ✓ | | |
| Gathering knowledge or information | ✓✓ | ✓✓ | | |
| Disseminating knowledge or information | ✓✓ | ✓ | ✓✓ | |
| Requesting action | ✓✓ | ✓✓ | ✓ | ✓ |
| Gaining agreement / commitment | ✓✓ | ✓ | | |
| Confirming agreements | ✓ | ✓ | ✓✓ | |
| Arranging appointments | ✓✓ | ✓✓ | ✓✓ | ✓ |

Your actions, rather than the words you use, are critical to success in face to face communication. We have all experienced the presentation of a person who is very knowledgeable but their performance is dry, dull and boring. The same material delivered by a different presenter could be lively and interesting. Understanding the impact we make when communicating face to face is vitally important.

When communicating face to face it is our manner, followed by the tone in our voice and lastly the words we use that make an impact. International research has shown that the recipient receives and interpolates messages through the following balance of reaction to the presenter:

- Body language 55%
- Voice tone 38%
- Words 7%

*Source: Prof Albert Nehrabian - UCLA*

If this data is used in conjunction with channel selection you can quickly recognise the potential for your communication to fail to meet its objective. For instance, email relies entirely on the meaning of the written word to convey its intended message. There is no body language or voice tonality to assist, and it is usually not real-time interactive. As such it can be a wonderful tool for confirming commitment, documenting an agreement, or passing on simplistic messages (e.g. a change of venue for tomorrow's appointment). However it is severely limited as a tool to build rapport, reach agreement, gain commitment, canvass ideas, or gather information. This is particularly true if the content is in any way complex or ambiguous (as much of our dealings tend to be). It is also difficult to use influence within an email. As a written record with audit trail, it tends to come across to the recipient as authoritarian. It does have the advantage of overcoming the tyranny of distance and time zones, but you can never be sure when the recipient will next access their email inbox. It is also superb for getting actions off your action list, but is that your sole objective? If you are looking for a successful outcome to the communication you may require some interaction, and the additional power of voice tonality and body language.

**Body Language**

## Why should you take note of Body Language?

Body Language is the unspoken communication that goes on in every face-to-face encounter with another human being. It tells you their true feelings towards you and how well your words are being received. Your ability to read and understand another person's body language can mean the difference between making a great impression or a very bad one! Also, your body language may be saying much more about you than you realise. Remember 93 per cent of our communication is nonverbal. We pick up 55 per cent of clues about people through facial expressions, postures and gestures, and 38 per cent through tone of voice. Only seven per cent of the communication rests with the words themselves. So while you may spend hours perfecting a presentation or creating a clinching argument to convince the managing director to back the project, what you really need to do is let your body do the talking. Mind and body need to work as one.

We are all experts at reading body language. We do it every day, unconsciously making judgments about people we see in the street or sit next to on the train. What is much harder is working out what their body language really means and how we come across to other people. Every one of us has experienced that feeling of an instant like or dislike of someone but without necessarily knowing why. We just weren't happy, there was something about them. We often refer to this as a hunch or gut feeling, two descriptions directly relating to our own body's physiological reaction.

**Eye contact** is one of the most important aspects of dealing with others, especially people we've just met. Maintaining good eye contact shows respect and interest in what they have to say. In the UK eye contact is kept around 60-70% of the time. However, there are wide cultural differences, so be careful.

**Posture** is the next thing. Get your posture right and you'll automatically start feeling better, as it makes us feel good almost instantly. Next time you notice you're feeling a bit down, take a look at how you are standing or sitting. Chances are you'll be slouched over with your shoulders drooping down and inward. This collapses the chest and inhibits good breathing, which in turn can help make you feel nervous or uncomfortable.

**Head position** is important. When you want to feel confident and self-assured, keep your head level both horizontally and vertically. You can also use this 'straight head' position when you want to be authoritative and taken seriously. Conversely, when you want to be friendly and in the listening, receptive mode, tilt your head just a little to one side or other. You can shift the tilt from left to right at different points in the conversation.

**Arms** give away the clues as to how open and receptive we are to everyone we meet and interact with, so keep your arms out to the side of your body or behind your back. This shows you are not scared to take on whatever comes your way and you meet things 'full frontal'. In general terms the more outgoing you are as a person, the more you tend to use your arms with big movements. The quieter you are the less you move your arms away from your body.

**Legs** are the furthest point away from the brain; consequently they're the hardest bits of our bodies to consciously control. They tend to move around a lot more than normal when we are nervous, stressed or being deceptive.

**Angle of the body** in relation to others, gives an indication of our attitudes and feelings towards them. We angle toward people we find attractive, friendly and interesting and angle ourselves away from those we don't, it's that simple! Angles includes leaning in or away from people, as we often just tilt from the pelvis and lean sideways to someone to share a bit of conversation.

**Hand gestures** palms slightly up and outward is seen as open and friendly. Palm down gestures are generally seen as dominant, emphasizing and possibly aggressive, especially when there is no movement or bending between the wrist and the forearm. In the subconscious mind hidden hands could be a sign of untrustworthiness.

**Distance from others** is crucial if you want to give the right signals. Stand too close and you'll be marked as "Pushy" or "In your face". Stand or sit too far away and you'll be 'Keeping your distance' or 'Stand offish'.

**Ears.** Your ears play a vital role in communication with others, even though in general terms most people can't move them much, if at all. However, you've got two ears and only one mouth, so try to use them in that order. If you listen twice as much as you talk you come across as a good communicator who knows how to strike up a balanced conversation without being 'me, me, me' or the 'wallflower'.

**Mouth movements.** We purse our lips and sometimes twist them to the side when we're thinking. Another occasion we might use this movement is to hold back an angry comment we don't wish to reveal. Nevertheless, it will probably be spotted by other people and although they may not know the comment, they will get a feeling you were not too pleased.

## What should you pay attention to?

**Nothing crossed.** Keep arms, legs, and feet relaxed and uncrossed. Also, if you are wearing a jacket, open it up. It relays the message 'I am open and honest with you'.

**Lean forward.** Move within 6 to 8 feet of your recipient. Lean slightly forward. Interested people always pay attention and lean forward. Leaning backwards usually demonstrates aloofness or rejection.

**Mirroring.** Pay attention to your recipient's breathing and the pace they are talking at. Take note whether it is fast or slow, then mirror them. If they cross their legs... slowly do the same.

**Direct eye contact.** Direct eye contact is a compliment to most people and builds trust in you. But be aware of the customs of people from other countries. It may be a sign of disrespect.

**Handshake.** Not too hard and not too soft. Pay attention to how you are shaking someone's hand.

**Colours.**

- Wear red to assert authority. Red makes you look and feel confident and in control and gives you an energy boost. Avoid it, however, if you want others to open up to you. You may intimidate them.
- Wear green to help you concentrate. It will focus your attention on what needs to be done.
- Blue will calm you in times of stress, but avoid it if you want to be creative.
- Purple is a brain-booster, so wear that when you need to be bursting with ideas.
- Black gets you taken seriously, but can make you conform to the corporate stereotype and It would be hard to stand out or have any flair.

**Interpretation of nonverbal behaviour**

## What do these actions indicate and how do others see you?

| | |
|---|---|
| Standing with hands on hips | Readiness, aggression |
| Steepling fingers | Authoritative |
| Sitting with hands behind head, legs crossed | Confidence, superiority |
| Brisk, erect walk | Confidence |
| Sitting with legs apart | Open, relaxed |
| Open palm | Sincerity, openness, innocence |
| Patting / fondling hair | Lack of self-confidence; insecurity |
| Biting nails | Insecurity, nervousness |
| Arms folded across chest | Defensiveness |
| Rubbing hands | Anticipation |
| Tilted head | Interest |
| Tapping or drumming fingers | Impatience |
| Locked ankles | Apprehension |
| Hands clasped behind back | Anger, frustration, apprehension |
| Head resting in hand, eyes downcast | Boredom |
| Sitting with legs crossed, foot kicking slightly | Boredom |
| Walking with hands in pockets, shoulders hunched | Dejection |
| Hand to cheek | Evaluating, thinking |
| Stroking chin | Trying to make a decision |
| Pulling or tugging at ear | Indecision |
| Looking down, face turned away | Disbelief |
| Rubbing the eye | Doubt, disbelief |
| Pinching the bridge of nose, eyes closed | Negative evaluation |
| Touching, slightly rubbing nose | Rejection, doubt, lying |

## Traps for young players!

Beware that a little knowledge can be a bad thing and it is easy to misread signals. Just because someone has their arms firmly folded should not be interpreted as being hostile if they have an open smile to go with it. Unless you have spent substantial time studying Body Language, Neuro-Linguistic Programming and associated areas, it can be dangerous to be too literal in interpreting the body language of others – there is a strong possibility that you could get it very wrong. It is much better to rely on your natural intuition. Nevertheless, familiarity with the basics of Body Language can be very powerful in enhancing the way you are perceived by others when delivering a message, always ensuring that your own body language compliments the message that you are trying to convey.

**Presence**

### *How do we cause people to take notice of us?*

We build a presence through our dress, posture, purpose and speaking style. By dressing for the occasion, maintaining a good posture and speaking in a well-structured manner, we will be authoritative and command respect from an audience.

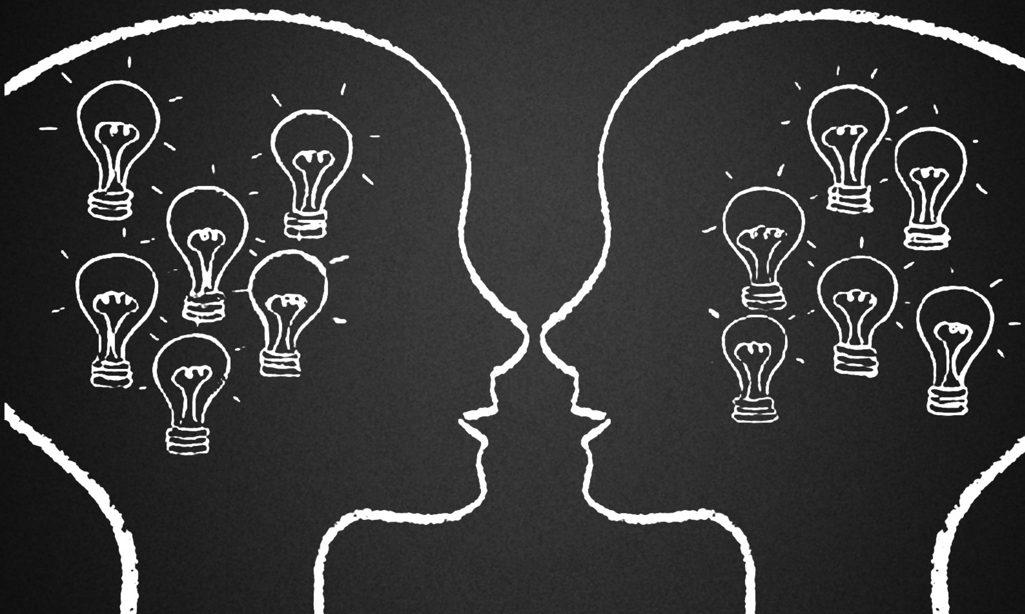
- Posture should be considered in terms of body language as discussed above.
- We must take sufficient time to deliver our message and be confident to pause, consider and allow debate.
- Presence cannot be built if there is no purpose for a person being part of a meeting or conversation. In a business environment, each participant needs a defined role for themselves, to be recognised within the meeting.

**Accountability**

### *If you misunderstand what your client has said, you have a problem.*

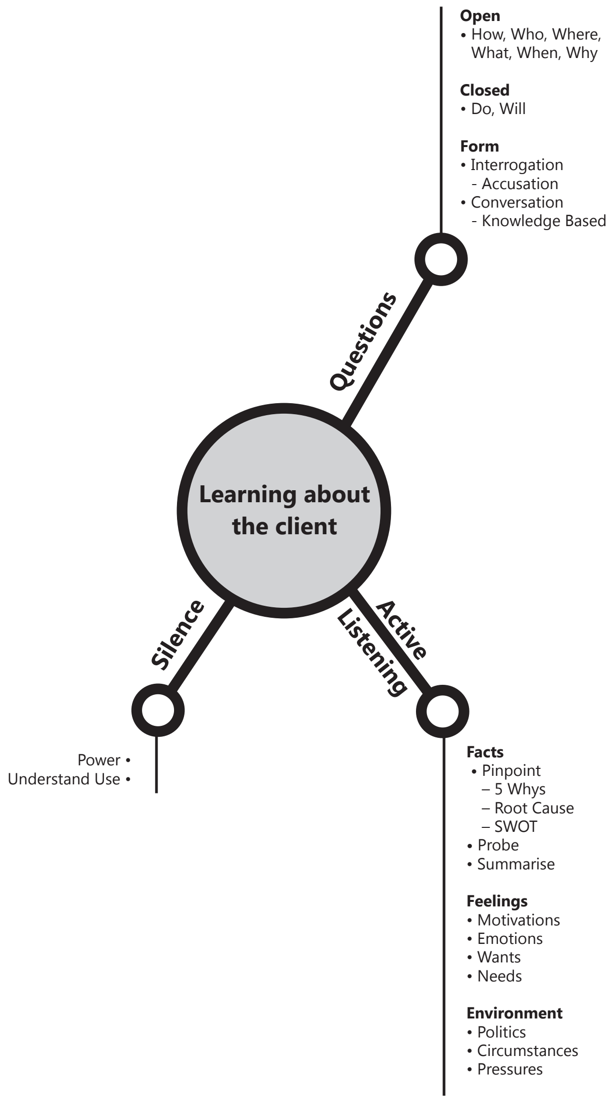
### *If your client misunderstands what you have said, you have a problem.*

At the end of the day, problems arise when nobody takes accountability for the effectiveness of their communication. Once you understand and accept this, you will begin to take accountability for ensuring that your communication is effective, and once you start doing that you remove a whole lot of complications from your life.



# CHAPTER FOUR

## Learning about the Client


Open
• How, Who, Where, What, When, Why
Closed
• Do, Will
Form
• Interrogation
- Accusation
• Conversation
- Knowledge Based
Questions
Learning about the client
Silence
Active Listening
Power •
Understand Use •
Facts
• Pinpoint
– 5 Whys
– Root Cause
– SWOT
• Probe
• Summarise
Feelings
• Motivations
• Emotions
• Wants
• Needs
Environment
• Politics
• Circumstances
• Pressures

# Chapter Four
## Learning about the Client

**The Elements**

The skills required to collect information about our clients are all available to us. However, we often fall into bad habits over time. We rarely deploy the full range of these skills, in a manner to create the best value for our clients or ourselves. This chapter has been prepared to stimulate the conscious application of these skills in order to maximise the value derived from our investigative and response activities.

As we discussed in the chapter on ‘Dealing with different Personalities’, one half of the world is naturally good at this. The Southerners like to learn. They are mostly patient and prepared to wait for a thorough understanding. Northerners are usually in a hurry to get on and lead. If they are to be successful at understanding the client, they will need to curb their enthusiasm.

In this short chapter, it is not possible to be definitive on this subject. The aim is to concentrate on raising conscious thought in areas associated with the skills required to be a high performing consultant. The chapter covers three prime areas associated with investigation and response activities.

The topics covered are:

- Questions
- Active listening
- The power of silence

**Questions**

### *How can you get the information you need?*

Questions are the means by which we stimulate others to give us the information we wish to collect. Well-structured and appropriately asked questions have a number of benefits. Some relate directly to the quality of information being collected, but others are concerned with building rapport and positioning ourselves as a relevant resource.

In summary, questions are brilliant when used to:

- Help us gather the information we are seeking
- Help us gain commitment from the client
- Demonstrate our knowledge and capability
- Help us to build rapport with our client
- Help us flush out objections, allowing us to address them
- Help us control the flow of a meeting

We use questions both socially and in business as the basis to start a discussion and develop structure to a conversation. A few excellent questions will usually be all that is required to maintain a lengthy dialogue, assuming the subject is of interest to the participants.

There are two forms of questions, ‘Open’ and ‘Closed’; each has a purpose and time for use in a discussion.

**Open questions** are designed to gather as much information as is available. They cannot be answered with a simple ‘Yes’ or ‘No’. They usually start with one of the words Who, Where, When, What, Why or How (5 Wives and 1 Husband). These six words are the basis for nearly all information collection and are essential and powerful allies in the collection process.

Open questions are used to:
- Generate discussion
- Gather information
- Build rapport
- Demonstrate credentials

Closed questions usually start with the words like ‘Can’, ‘Do’, ‘Should’, ‘Would’ or ‘Will’. The intention is that they be answered with ‘Yes’ or ‘No’.

Closed questions are used to:
- Gain commitment
- Confirm simple facts

## *There is an art to asking questions.*

Questions need to be well paced and not rushed. Allow time for the other parties in the discussion to answer the question. Rushing questions is likely to cause other participants to become resistant to the constant barrage, and stop answering or provide guarded or cryptic answers.

The questions you ask, should be answered by others. To ask a question and then proceed to answer it yourself, will again lead participants to limit the information they provide, and think of the questioner as a person not prepared to listen to the views of others. Think about how you feel if someone asks you a question and then answers it before you can even think of an appropriate response!

Questions should be asked ‘one at a time’, or the listener will be tempted to say, “Which one should I answer first?” If you don’t think your first question was startling, just wait for the respondent to reply. If you need to ask a follow up question, that is better than a string of questions about the same thing. The exception to this rule is when you ask paired questions. This is actually a two-part question about the same thing. An example of this might be: “What was last year’s revenue figure and where you happy with it?” This is asking about what actually occurred and how important (or not) it was. This addresses the ‘East’ and the ‘West’ in ‘Quadrant’ terms.

Critical to effective questioning is the recognition that open questions can be asked in two distinct ways. One is likely to illicit full and frank discussion while the other will lead to partial or even deflected answers and a closed attitude to further questions.

The two approaches are:
**Conversational** - Seek opinions within the framework of the question
‘What do you think lead the design team to make that decision?’
**Interrogatory** - Directly demand an explanation
‘Why did the design team fail to realise the error in taking that decision?’

**Active listening**
How should I be following up my questions?

We were born with two ears and one mouth. A balanced approach to listening and talking is essential to being considered a good listener. Questions are essential in gaining the facts and are the first pillar to active listening

The art of active listening is to confirm to the other parties that you have not only heard their words, you have understood them. One way of doing this is to replay a summary of their words in a way that demonstrates your understanding. This can initially be a challenging skill to practice, because it often sounds like we are merely ‘parroting’ back to the other parties what they have said. The skill is to put your understanding of their words into your own words.

There are terrific benefits to active listening.
- The summary confirms your understanding - the other participants will verify this understanding or correct it.
- As you summarise your understanding, the other participants are very likely to provide extra information that supports and expands on what they have already told you.
- It provides some time for you to think of your next question.

**Probing to better understand the facts**
Good questioners and listeners also probe well. Usually the answer we get to our initial question is of a high level and provides little detail. It is somewhat like the headline in a newspaper “GILLARD MEETS OBAMA”. If we want to know where they met, what they

discussed and agreed, who else attended, what outcomes are expected, when and who will implement them, we need to read further into the text of the story. In a similar way, we often need to be prepared to follow up our initial questions with further probing questions in order to pinpoint critical details, or understand the broader context of a statement or piece of information.

The benefit of probing can be summarised as follows:

- Help us to dig down to find out the real issues
- Clarify the Business Driver behind the need
- Provoke deep conversations by challenging the respondent to think broadly
- Focus on learning rather than reiterating the standard reply
- Highlight the collaborative quality of the communication
- Move the participants into new territory where they don't already have stock answers
- Lead to new perspectives for the participants

We can use the available investigative tools as we probe.
Among the most valuable are:

- Pinpointing - refer to the figure below
- Root cause or 5 Why's analysis – asking why up to 5 times around a specific issue will usually identify the true root cause.
- SWOT analysis – the determination of the strengths, weakness, threats and opportunities associated with an issue, project or function.

## A high level example of pinpointing

| Question | Unpinpointed | Pinpointed |
|---|---|---|
| What? | Poor inventory management | Overstocking of product x |
| Where? | Asia pacific | In New South Wales |
| When? | During FY 2004/5 | During the first quarter of 2005 as compared with the same quarter last year |
| How much? | A slight increase | A 15 percent increase in stock |

## Probing to establish context

Sometimes in our questioning we get responses that are detailed, and lack the context that may be essential to our full understanding. Often when dealing with people who are extremely familiar with their subject matter, there can be a tendency for them to assume that we share that familiarity. If we don't, this can lead to a dilemma; do we admit our ignorance in order to gain a full understanding, or do we fake it and hope it will all magically become clear later?

One thing we can do is ask questions to help us understand the context.

- "Can we step back and look at the big picture, what are the over-riding objectives of this project?'
- "What are the Business Drivers for this initiative?"
- "How will you know that you have succeeded?"
- "What will success look like"

All of these questions help us to get a broader view of things so that we understand the context before we dive into the detail.

**The value of a summary**

Another very powerful tool available to us is the art of summarising. This will both ensure we have understood the information provided and equally enable the parties providing the information to further elaborate on the points made. It is very common that after a summary, participants will add valuable additional information, either as extra facts or more likely additional context to the points they have been making.

The benefits of summarising are:

- Helps to reveal and resolve misunderstandings
- Demonstrates to the client that we are interested in what they are saying, building rapport
- Demonstrates our understanding of the issues, highlighting our value
- Often provokes the client to expand on our summary and give us more information
- Motivates our brain to focus on listening

Be aware that providing an effective summary requires that we have a clear understanding of all the areas associated with the issues under discussion. These include:

- The facts associated with these issues
- The clients wants and needs with the relevant Business Drivers
- The feelings, motivations, emotions surrounding these issues
- The politics, circumstances and pressures affecting these issues.

## It wasn't meant to be easy

Active listening is not easy. Focus must to be maintained. We all have the capacity but are too easily distracted by what is happening around us.

**The Power of Silence**

## Why sometimes you should just shut up!

Believe it or not, silence can be a very powerful communication tool. We are all used to the convention of polite conversation that suggests when one person finishes talking, another responds. When we break this convention and there is no response it often causes anxiety, and in that moment of stress we can do irrational things. The first is to remove the cause of discomfort by filling the silence, regardless of whether or not we have anything useful to say. Abraham Lincoln was reported to say:

**"Better to remain silent and appear a fool than to speak out and remove all doubt"**

He could well have been referring to this trap set for inexperienced players.

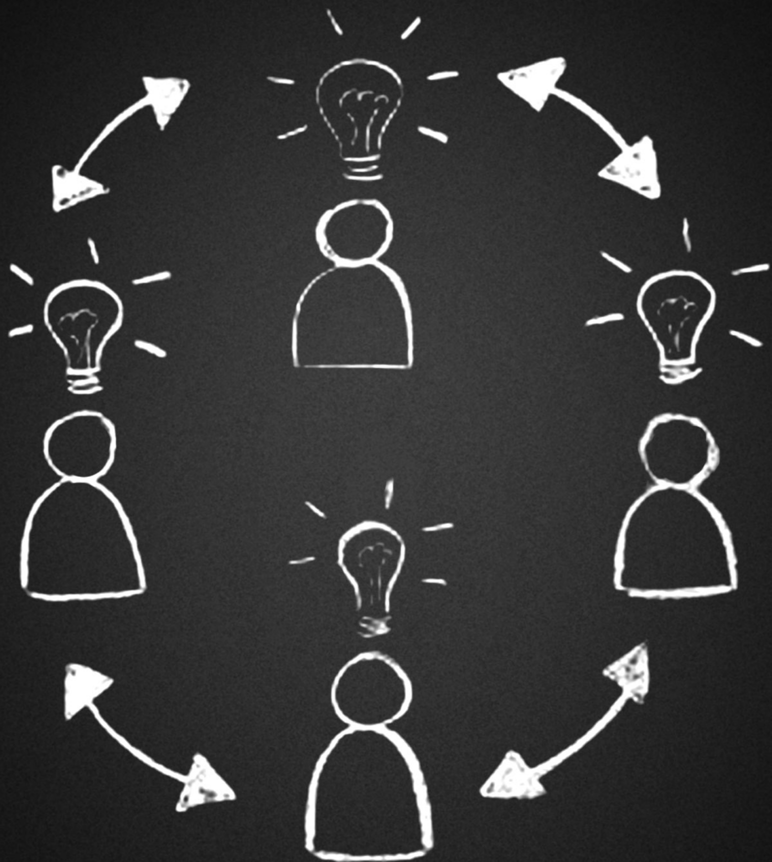
It appears that the brain's programmed response to this sort of stress is governed by two rules:
- Last in, first out
- What you say relates to something you were recently discussing or thinking about.
- Ignore the negative
- If someone had said "don't mention the war", you are likely to ignore the "don't" and talk about the war, as immortalised by John Cleese in Fawlty Towers.

You can probably recall a time when you were determined not to divulge something, but when the meeting finished you were kicking yourself, because for no apparent reason you had blurted out the very stuff you did not want to say. You were likely a victim of the silence technique. The beauty of the technique is that you will often find out the very things that others were determined not tell you.

The technique it is often used following an open question. Once the responder finishes answering and expects the questioner to say something, there is silence. The responder starts to feel uncomfortable, 'Perhaps I have not been relevant or answered adequately?', and desperately seeks something else to say. It is a legitimate technique and is taught to many professional communicators including Police Investigators, Sales People, Negotiators, Auditors etc.

Do not over-use this technique as you could risk becoming unpopular and it is not a great rapport builder! The process is stressful and forces information in a manner that makes people wary of the person using the technique. Used selectively it can be most enlightening.

Beware that it may also be used on you. Understand what they are doing, and be comfortable with long pauses. Use the time to compose yourself, and plan an elegant way out of the stalemate. The best response is to ask a question. This way you are not likely to inadvertently disclose any sensitive information.



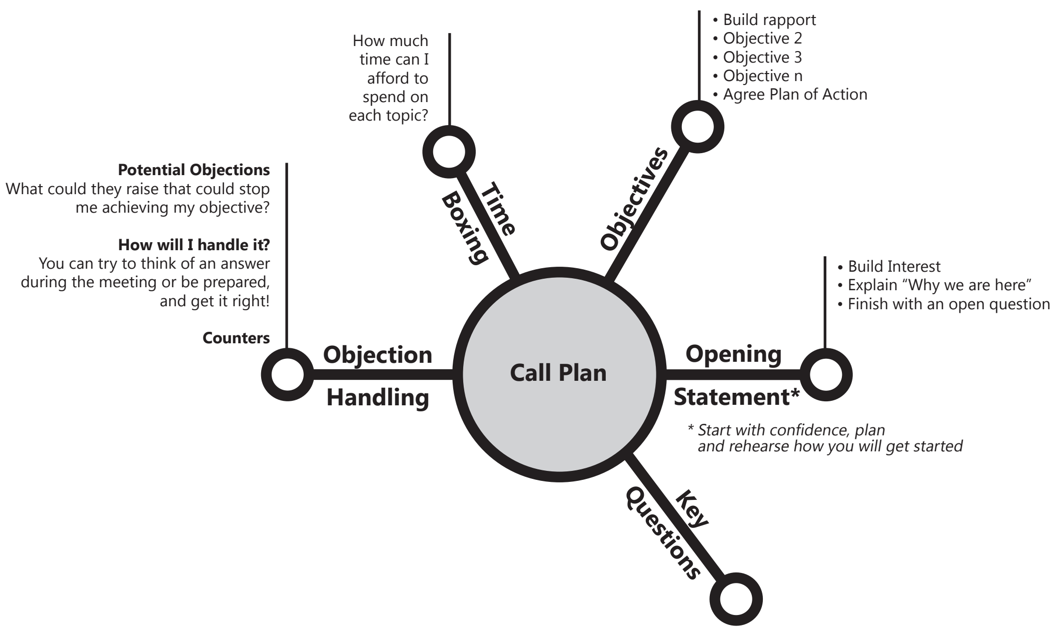
# CHAPTER FIVE

## Communication Planning

# Chapter Five
## Communication Planning - 'The Call Plan'

**Introduction**
During the course of our consulting assignments and day-to-day business, we have limited time in face-to-face meetings with the internal and external clients. This may not be the majority of our working day, but the outcome may significantly impact the rest of our work. A 2% difference here could be the difference between 'An agreement or not', 'A promotion or not' or 'A positive performance discussion or not'. It is important that we make the most of these valuable opportunities. It is worth investing a few minutes prior to any meeting to ensure you maximise the value to both yourself and your clients. This is true for an interview, group meeting, presentation or workshop. The 'Call Plan' is a meeting preparation tool that helps to structure your thoughts. It focuses on the key areas needing to be considered, prior to any meeting. It is designed to be a productivity tool for you. Therefore, it dispenses with any bureaucracy, while providing a pragmatic framework to allow you to prepare for a better meeting, in just a few minutes.

**The elements of a Call Plan**



**Objectives**

There are two mandatory objectives:

- To build rapport
- To agree the plan of action

Rapport is essential to any successful long-term relationship. At every touch point you have with your client, you are either building that rapport, or moving backwards. It's worth making a conscious effort to ensure you are moving forward.

Near the end of a meeting it is important to formally agree 'who is going to do what' as result of the discussion. So much value and productivity are wasted when this does not happen – great initiatives are abandoned because there was no plan going forward. From a personal point of view there are two excellent reasons why you want to agree a plan of action.

1. You may otherwise leave the meeting believing that you have no actions to take, whilst your client believes that you will be doing certain tasks. Your credibility with this client is now at risk, and you are not even aware of it.
2. When you ask the question "are there any actions arising?", this can be the catalyst for arriving at some useful next steps. We should remind ourselves, that we are being paid for outputs and not inputs.

You will usually have other objectives specific to the particular meeting. We might describe these as transactional. They may be: resolving financial constraints, understanding the client requirements, agreeing milestones, resolving contentious issues etc.

When you have meetings where you have prepared your objectives,
you will find numerous improvements:

- Meetings will be shorter
- You will get greater productivity and advancement
- You focus on achieving objectives, rather than talking about 'stuff'
- When any colleagues are at the meeting with you, the team will be better coordinated
- Your clients will start noticing the difference
- After the meeting you will have a yardstick against which to gauge your performance and allow you give yourself objective feedback.

**A structure for a Call Plan document**

**Call Plan**

| **Objectives** | **Key Questions** |
|---|---|
| Establish Rapport | |
| | |
| | |
| | |
| Agree plan of action | |
| | |

Opening Statement "..........................................................................................................................................
..........................................................................................................................................................
........................................................................................................................................................"

| Potential Objections | Counters |
|---|---|
| | |

**Time Boxing**

**The Opening Statement**

First impressions of you and your team are made in the first thirty seconds of a meeting or presentation, and are hard to change. You only get one chance at this, and so a little preparation is invaluable. The table below illustrates a real presentation where the nervous speaker, in the absence of planning, started in a somewhat clumsy way. On the right is what they intended and would have delivered had they been better prepared.

| Ad Lib (Cavalier) | Planned & Rehearsed (intended) |
|---|---|
| "I would like to present our presentation on the findings that we found" | "I would like to present our findings" |

In around 70% of relationships those first impressions never change. How do you want to kick off your next meeting or relationship?

**Key Questions**
Asking good, insightful questions is one of the best ways to demonstrate your value to a client. Specific questions about the clients industry or sector, shows a depth of knowledge from your side. What questions can you plan in advance to demonstrate the value you bring to the relationship? You could hope that they will occur to you during the meeting, however, this may cause you not be fully attentive. It is far preferable to plan appropriate questions in advance.

**Objection Handling**
Given that you have set yourself some objectives for a meeting, you should also consider what could derail you. If you can anticipate potential objections before the meeting, you can thoroughly prepare convincing replies, in order to keep your objectives on track. Alternatively, you can test your impromptu speaking skills during the meeting, to come up with a convincing response!

**Time-boxing (see also ‘Facilitation’)**
Some of the more complex forms of communication, including presentations, seminars, and workshops, start with great ideas and enthusiasm. Unfortunately, they often over run and the discussion is never concluded satisfactorily. If you don’t get to the stage where agreement has been reached and an action plan documented, then there is every chance that significant value will be lost.

Most communications take the broad form of:
- Introductions, including People, Objective and Agenda.
- Exchange of ideas, brainstorming, gathering of information.
- Challenging these ideas to validate them, eliminating those that are not relevant.
- Decision making
- Agreeing actions

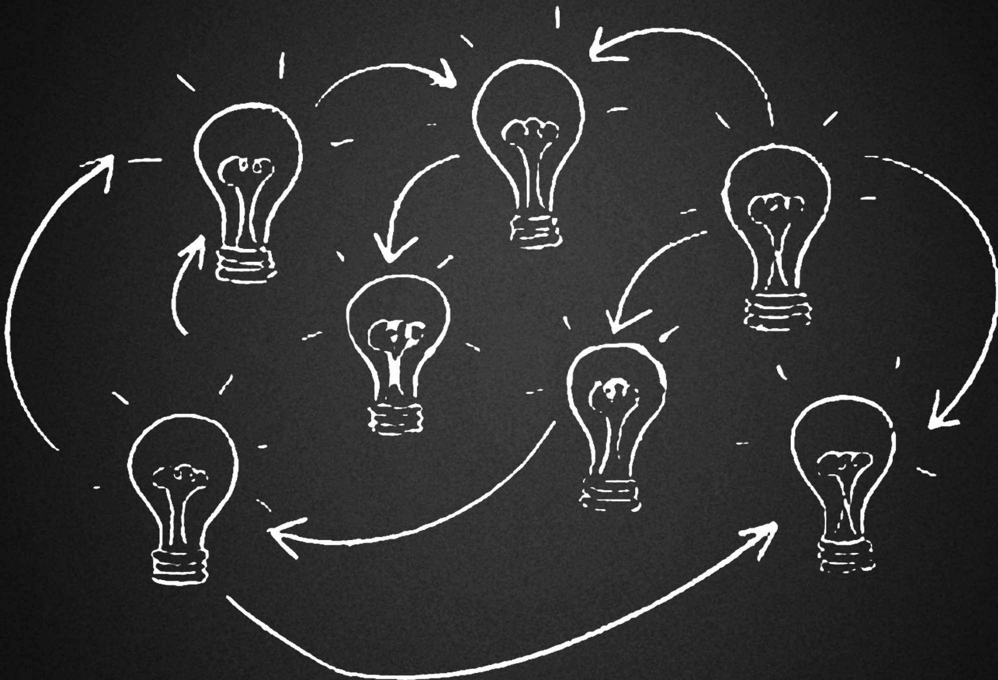
If you wish to ensure that you will achieve all your objectives, you need to manage the time you spend in each of these steps. The preparation of a timing plan in advance, and managing time to that plan, ‘Time-boxing’, will help you achieve this.

**Outcomes**
The results of effective planning are often:
- Shorter Meetings
- Better listening by you
- Better outcomes
- People more willing to attend your future meetings
- Less moments of Surprise/Horror

**Summary**

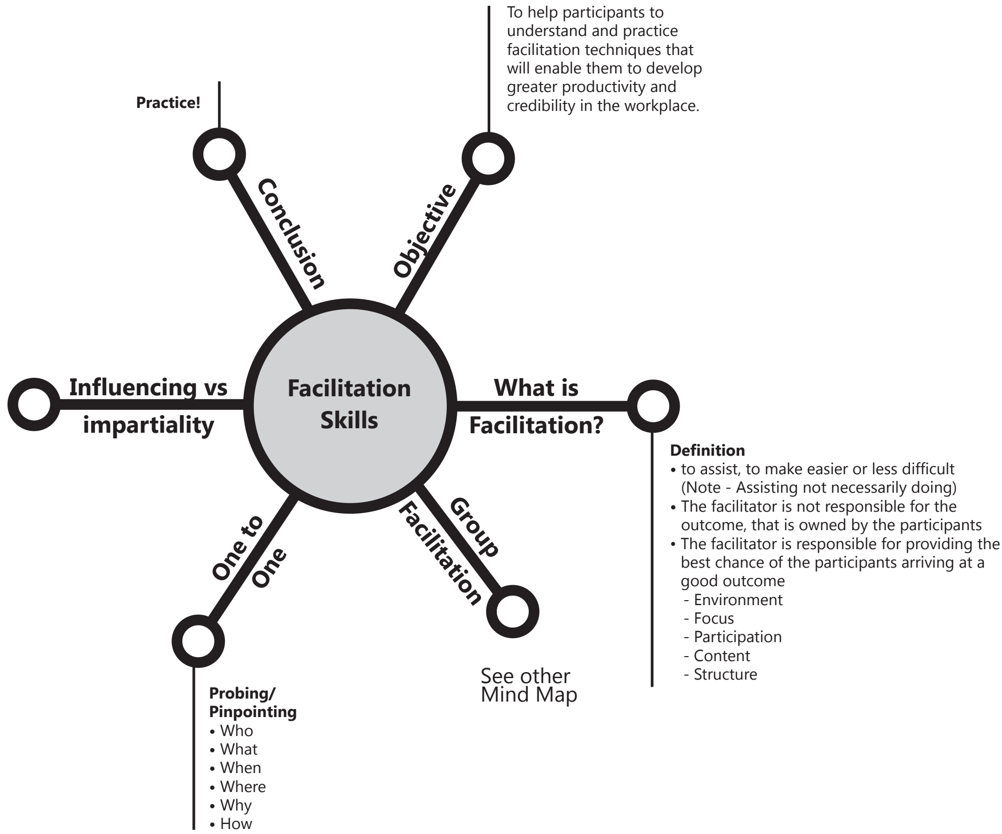
Many people approach meetings with a feeling of 'dread'. They hope to 'survive' or 'get out alive'. Some think that they will 'see what happens'. The reality for many of us, is that 'failing to plan' amounts to 'planning to fail'.

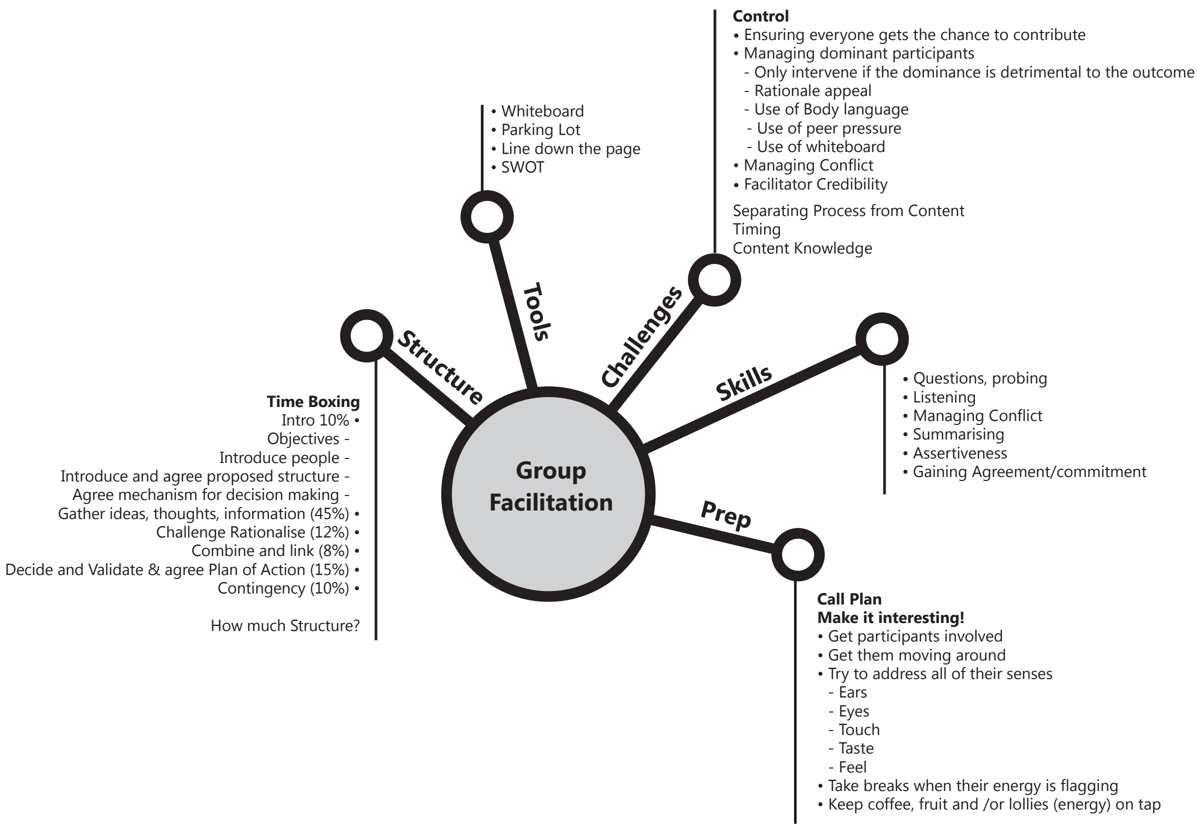
We can go into meetings planning to succeed. With practice, we can prepare in less than 15 minutes, for many of our meetings. We will improve our success rate dramatically, whilst reducing our stress levels. Our reputation is directly linked to the way we run meetings and our performance in them. Preparation is the key.



# CHAPTER SIX

## Facilitation Skills


Facilitation Skills
Objective
To help participants to understand and practice facilitation techniques that will enable them to develop greater productivity and credibility in the workplace.
What is Facilitation?
Definition
• to assist, to make easier or less difficult (Note - Assisting not necessarily doing)
• The facilitator is not responsible for the outcome, that is owned by the participants
• The facilitator is responsible for providing the best chance of the participants arriving at a good outcome
- Environment
- Focus
- Participation
- Content
- Structure
Group Facilitation
See other Mind Map
One to One
Probing/ Pinpointing
• Who
• What
• When
• Where
• Why
• How
Influencing vs impartiality
Conclusion
Practice!


Group Facilitation
Structure
Time Boxing
Intro 10% •
Objectives -
Introduce people -
Introduce and agree proposed structure -
Agree mechanism for decision making -
Gather ideas, thoughts, information (45%) •
Challenge Rationalise (12%) •
Combine and link (8%) •
Decide and Validate & agree Plan of Action (15%) •
Contingency (10%) •
How much Structure?
Tools
• Whiteboard
• Parking Lot
• Line down the page
• SWOT
Challenges
Control
• Ensuring everyone gets the chance to contribute
• Managing dominant participants
- Only intervene if the dominance is detrimental to the outcome
- Rationale appeal
- Use of Body language
- Use of peer pressure
- Use of whiteboard
• Managing Conflict
• Facilitator Credibility
Separating Process from Content
Timing
Content Knowledge
Skills
• Questions, probing
• Listening
• Managing Conflict
• Summarising
• Assertiveness
• Gaining Agreement/commitment
Prep
Call Plan
Make it interesting!
• Get participants involved
• Get them moving around
• Try to address all of their senses
- Ears
- Eyes
- Touch
- Taste
- Feel
• Take breaks when their energy is flagging
• Keep coffee, fruit and /or lollies (energy) on tap

# Chapter Six
## Facilitation Skills

### *'Assist others to achieve results more quickly and easily'*

**Introduction**

The objective of this chapter is to help you understand and practice the facilitation techniques that will enable you to develop greater productivity and personal credibility in the workplace.

To facilitate is defined as:

- To assist, to make easier or less difficult (Oxford English Dictionary)
- To make easier, to assist the progress of (Collins English Dictionary)

Note that:

- Assisting does not mean doing. If you wish to participate, appoint someone else to facilitate.
- The facilitator is not responsible for the outcome; the participants own that responsibility.
- The facilitator is responsible for providing the best chance of the participants arriving at a good outcome.
- 'You can lead a horse to water but you cannot make it drink'. As a facilitator you can provide a group with every opportunity of arriving at a good outcome, but in the end it is up to the participants to actually reach it!
- The best facilitators work out how to "get out of the way". The group is often far better with their material than we are.

**One to One Facilitation**

### *'Can't see the wood for the trees'*

Most of us have at one time or another possessed all the information required to make a decision and move forward, but somehow lacked the ability to do so. It might be that we are too close to the topic and our mind is so cluttered with detail that we fail to focus on the strategic issues. It might also be that on our own we are failing to go through the logical processes that will lead us to the important issues in the decision. Explaining our dilemma to someone who has no previous knowledge of the subject matter can often help us reach a conclusion. It forces us to step back and think through the issues logically and, as a result, the answer usually drops out.

In a one on one situation the role of the facilitator is to be the sounding board that assists the client in thinking through the issues more logically and ordering their cluttered thoughts in order to come to a conclusion. It requires little or no previous knowledge of the topic. This allows us to ask the dumb questions that often turn out to be the most insightful.

Our role is to probe. Our tools are open questions; Who, What, Why, Where, When and How.

It can be tempting to offer advice and tell the person what they are too blind to see. This would be a mistake as it is far more effective if they can come to that conclusion themselves. We simply ask the questions that will lead the client to the conclusion. Then they will own it.

People normally expect the facilitator to be the one standing at the front with the whiteboard markers, but often in one to one facilitation it can be very powerful to get the client outlining their thoughts on the whiteboard, while the facilitator asks those probing questions.

The value of this one to one facilitation is that it can break through a blockage that otherwise might hold things up for days, weeks or even months. It is also very satisfying to feel the relief and excitement from the client when they have experienced such a breakthrough on an issue that has been niggling at them.

**Group Facilitation**

## 'The Challenges'

**Control**
Managing interaction is probably a better way of describing this, as the facilitator is not usually bestowed with the authority to control, and in any case control might lead to an inferior outcome. Nevertheless the nightmare of many facilitators is 'What if I lose control?' or 'What if arguments start to develop, and the Northerners hijack the event?' Equally challenging, although often less confronting, is the risk of not getting sufficient participation. In the worst case; no participation.

In an ideal facilitation, all participants will contribute to the discussion equally. Differences of opinion will be voiced cordially and politely and resolved in a mature way. Real life isn't always like that! If channelled correctly, passion, enthusiasm and emotion can add huge value to the overall outcome, It may not be orderly, but it is important.

**Authority**
It is often the case, that we have no real authority over the people in the room. Even if we do, it might be better to have them give authority to you. The best way to do this is to present the group with an 'Agenda' and some 'Ground Rules', then have them all agree. It is important to have timings on the agenda and confirm that everyone is happy with what

is being proposed. You may want to ask if there should be anything else added. If there is, you will need to renegotiate the timing and possibly drop something else. The same approach applies to ‘Ground Rules’. Put them up somewhere visible, ask for additions, and eyeball everyone when seeking their agreement.

Once you have agreement on ‘Agenda’ and ‘Ground Rules’, you have all the authority you need. You don’t need to bring in your own authority, if things go awry. All you need to do is point at the ‘Agenda’ and/or ‘Ground Rules’ and reconfirm that this is still how the group wishes to proceed. Without these in place, you will have to start acting like you’re the parent and they are the naughty children. This does little for ‘Rapport’ and is often awkward.

**Ensuring everyone gets the chance to contribute**
The role of the facilitator is to ensure that everyone gets an equal opportunity, which will often mean restraining the Northerners and encouraging the Southerners.

It can be intimidating for a shy participant in a room full of people to be directly approached by the facilitator with a cheery “Well you haven’t said much yet, what do you think?” The facilitator might want to be more sensitive in how they solicit ideas from the group.

One idea is to go around the room every so often and ask each person for their thoughts. It is OK for participants to pass if they don’t have anything particular to add, but it at least gives the quieter participants a chance to add their thoughts without feeling the spotlight is on them.

In contrast, when we are trying to get thoughts, ideas or grievances out into the open, it is a mistake to start at one end of the room and get all the ideas from the first person before moving on to the next and so on working around the room. It may seem a logical process, but the people at the far end of the line will feel completely neglected. They are likely to become totally disengaged or disruptive in order to be heard. It is an obvious consequence when we stop to think about it, but it is often repeated in practice.

**Managing dominant participants**
There are many ways to influence dominant participants in order to allow opportunities for the views of others. A stand up argument between the facilitator and the dominant participant is rarely the best approach, but unfortunately that sometimes occurs. Before you resort to confrontation, try:
The rational appeal

- “Thanks David, we have a number of your ideas now, perhaps could we get some input from the other participants”
- Use of Body Language
- Open hand to the dominant participant, like a stop signal. Eye contact with other participants.

- Use of peer pressure: “Would anyone else like to comment on David’s suggestions?”
- Standing up or walking to the whiteboard with a marker pen tends to bring focus and control back to the facilitator

Only intervene if the dominance is being detrimental to the outcome of the session.

**Separating Process from Content**

The facilitator’s role is primarily around the process of the event, with the content being the domain of the participants. The facilitator does sometimes need to ask questions, explore options and suggest compromises when the participation flags or becomes deadlocked. It takes skill and experience to know when this intervention is needed by the facilitator, but the general rule should be not to intervene in the content of the discussion unless it is clearly going off track, has become bogged down or deadlocked, or the participants are obviously missing an opportunity.

**Timing**

Managing time is the responsibility of the facilitator, and can be quite a challenge. As we discussed, without a timed agenda, getting participants to move from one section to the next can be difficult. If we have one we still need to manage it. How will you track time?

- Is there a clock conveniently located in the room?
- Do you need to bring one, or can you manage with your watch?
- Can you pre-set a timer on a watch or mobile phone to bleep at the key moments?

It is a task that you may choose to delegate to one of the participants, “Can you prompt me after 10 minutes and after 25 minutes?” Be sure you chose someone you can rely on. It can be frustrating to get your 10-minute prompt at the 25-minute point!!

**Content Knowledge**

Content knowledge of the topic about to be discussed can provide the facilitator with added confidence, but is not necessary in most situations. If we have a desire to add to the content, we should appoint another facilitator. Managers often fall into this trap. If the person facilitating starts contributing, then the facilitator has left the room. Remember that as facilitator we are there to manage, guide and, where necessary, control the process. Subject matter expertise could cloud the impartiality. The output needs to be theirs. We need to manage the boundaries.

A frequent blockage in achieving a good outcome from a workshop is the presence of assumptions. Working from assumptions can be dangerous, much safer to work from facts. Worst of all is to be working from assumptions that we are treating as facts. A useful role for the facilitator is to remove, or at least get the participants to acknowledge, these assumptions. When the facilitator has limited subject matter expertise they are in a strong position to ask the ‘dumb questions’. These often turn out to be most productive as they can reveal false assumptions, or identify issues that need to be addressed. Sometimes, because nobody else was game enough to raise them. As the facilitator we should be in the position to ask these questions without risking our credibility.

**Preparation**
The 'Call Plan' can be a very useful tool in helping to plan for a communication event, and the facilitation of a workshop is no exception. We will have a better chance of succeeding if we put some thought into:

- Our Objectives
- Our Opening Statement
- Key Questions that we might like to ask
- Potential Objections that could frustrate us reaching our objectives
- Responses to those objections

You also need to consider the environment including:

- Layout of the room
- Seating of the participants
- Availability of refreshments
- Whiteboard, flipcharts with functioning pens, notepads and pens for participants and, data projector and screen position.

## *'The structure'*

**Time-boxing**
Prior to facilitating a group discussion, it is essential we give some thought to the structure of the discussion and identify the steps we will go through to ensure we reach our objectives. A challenge that often defeats an otherwise well facilitated session, is the time management of these steps.

The typical facilitation will have a brain storming session to gather every participant's ideas and get everyone to a common level of understanding. This is a productive and vital part of most workshops, but unless carefully controlled, it can result in being the only part. Once ideas start to flow, further ideas are generated off the back of them. Discussion and constructive argument will follow, and the group can become fully absorbed by the process. We will not gain an optimum outcome unless the facilitator is able to move the discussion on to the next stage. We will simply end up with a series of ideas, but no firm conclusions or plan of action.

The following is a generic suggestion for structuring a workshop, but it will not fit all needs, and will probably need to be modified for any particular situation. The percentage reflects the amount of time you may want to spend on that step. In your real life planning this would be better recorded in minutes or hours, and the proportion of time on each section will vary according to the objective.

**Introduction (10%)**

- Objectives
  - Make it clear and gain agreement on why we are here (our Agenda), and what we expect the outcome to be. Also clarify and confirm constraints (e.g. time, resources)
- Introduce people
  - Ensure every one knows or is introduced to the other participants, understands their roles in the organisation and, more importantly, what their role is in this particular discussion.
  - This may not be necessary if the group is already well acquainted.
  - It is an opportunity for the facilitator to introduce himself or herself and demonstrate some 'Value'.
- Introduce and agree proposed structure
  - To provide participants a road map of the session you will be running with them.
  - It can be useful to run through your proposed structure of the workshop, and get their agreement to it.
  - Agree the final decision making mechanism. It is worth doing this early. As the facilitator you have little or no input into the final decision (you would not normally have a vote), nor do you have the authority to decide how the final outcome will be decided. If you leave the decision making process open until the last 5 minutes of the exercise, then the group will probably not agree on the process let alone actually make a decision. Those in the minority will know they are in a minority, and will logically argue that a majority vote is not an acceptable way to decide. If we sort out the decision making process early, participants will have less entrenched views and may be more open to a logical decision process rather than trying to manipulate a process that suits their cause.

**Gather ideas, thoughts, and information (45%)**

Usually a key objective of group facilitation is to:

- Ensure all participants have a common understanding of an issue, and/or
- Identify ideas on how to resolve an issue

In either case some method of gathering information, thoughts and ideas is needed and often a form of brainstorming technique can be useful. Be careful not to spend all of the allotted time on brainstorming. You may generate some great ideas and have a lot of fun, but unless you have time to rationalise and process these good ideas there is a real danger that they will be lost. It is the facilitator's role to ensure the whole agenda is covered within the allotted time.

**Challenge, Rationalise (12%)**
With any good brainstorming session, along with the great ideas there will be a lot of impractical or unusable suggestions. Since the major objective is often to arrive at one agreed way forward, we now need to reduce the number of options to a manageable level. A good start is to remove the ideas that are unlikely to be useful.
Some good criteria to test options are:

- Is it practical?
- Could we make it work within the organisation?
- Do we have the technology, resources, know how available?
- Is it ethical / legal?

Let's not 'throw out the baby with the bath water'. As options are rejected, make a note of any attractive features that may be able to be incorporated into an alternative, more practical, option.
Remember the facilitator manages the process and generally should try to avoid making judgment calls on behalf of the participants.

**Combine and link (8%)**
Once you have eliminated the non-starters, you are often left with a number of similar or related ideas. It is a good idea to see whether any of these can be combined, so that we are left with fewer options to be considered, and the process can often enrich the remaining options.
If there appears to be two or more factions developing, it may be worth investigating whether there is a composite solution that combines the most important features of several ideas. There is little point creating a win/lose solution with a big losing minority when there is a more universally acceptable outcome lurking amongst the ideas. This may still end up by identifying more than one possible solution.

**Decide and Validate and Agree Plan of Action (15%)**
If the objective of the facilitation exercise was to make some decisions, now is the time to make them. Remember it is the participant's decision not the facilitator's, so your role is to guide them through the process.

You may have earlier agreed on the process of decision-making, for example 'one person one vote', in which case it should be fairly simple to apply this process. If not, you will now need to agree the decision-making criteria.

When it comes to voting, it can be as simple as a show of hands, or each person might have a number of votes to spread across a number of options. You may use post-it notes or marker pens to allow participants to vote on the whiteboard, which gets participants moving, or you may need to do some sort of secret ballot.

Once the voting is complete, it is normally a good idea to validate the answer with the participants and agree on the next steps.

**Contingency (10%)**
It is always better to finish the workshop with some time to spare at the end than to not reach a conclusion and leave participants unclear about the plan of action going forward. It is worth allowing for some contingency in your planning. Rarely does it remain unused!

**How much structure?**

*'The more structure you introduce the less creativity you will stimulate'*

The level of structure should be appropriate for the objectives. Not all meetings need to be creative. When approaching a major project milestone, the project manager might demand a 30-minute meeting each morning with all direct reports to understand any new issues that have arisen and check progress. This sort of meeting needs to be short and concise so that everyone can get back to his or her tasks. It would be sensible to impose a rigid structure and time constraints on this meeting. Impose the same rigidity on a brainstorming session to explore the meaning of life, and you may well be disappointed with the quality and quantity of new ideas and concepts.

**'The Process'**
Make it interesting!
If we are going to get a good result, and be perceived to have done a good job, we need to keep all the participants engaged. We have all attended sessions where it was hard to stay awake. That is not the sort of sessions you want to run.

Think of interesting and unusual things you can incorporate to keep the interest going.
- Get participants involved
- Get them moving around
- Try to address all of their senses; Ears, Eyes, Touch, Taste, Feel
- Take breaks when their energy is flagging
- Keep coffee, fruit and/or lollies (energy) on tap

Skills (covered elsewhere in the Book)
- Probing Questions
- Listening
- Managing Conflict
- Summarising
- Assertiveness
- Gaining Agreement / Commitment

## ‘The Tools Available’

**Whiteboard**
The whiteboard is a magnificent facilitation tool for capturing ideas and issues as they are raised, and making participants feel that their contributions were valued and recorded.
It is used to list objectives, outline the structure of the discussion, collect ideas during brainstorming, record findings etc. It can also be a useful control mechanism. The facilitator moving to the whiteboard with the pen can help restore focus on the stated objective.

It is not essential that the whiteboard belongs to the facilitator. Sometimes it can be useful to delegate the recording of ideas to another participant, giving the facilitator more time to focus on the audience.

If you are recording what is being said, then you need to be accurate. If you start to use different words or interpret what is being said, you will get resistance. The greatest sin is to write some things down and not others. If you are unhappy with a comment, write it down anyway. It is their material and not yours. Unfortunate ideas will tend to disappear as the process continues.

In the absence of a whiteboard a flip chart will do but is less flexible. With groups of less than 5 people, pen and paper can work.

**Parking Lot**
During any discussion there are likely to be issues that arise that are important to some participants, but are a diversion from the overall objectives. To dismiss them can cause resentment, whereas to spend time on them risks derailing the true objective. The Parking Lot is an area of flip chart or whiteboard used to record these issues so that they may be picked up later. You should gain agreement from the group that the issue belongs in the Parking Lot. If you tell them it does, then you have introduced ‘Authority’ inappropriately.

It is important at the conclusion of the discussion to acknowledge the ‘Parking Lot’ and agree a plan of action on the points.

**Line down the page**

## ‘Pros | Cons’ or ‘Plan A | Plan B’
When the group is getting into discussion about the pros and cons of various options or ideas, or if you are trying to get them to such point, the extremely simple construct of a line down the middle of the whiteboard can be invaluable. It allows you to record points in favour of each side of the argument in a visual way that can assist with assessment of the argument later. It keeps everyone involved and lets every participant see that his or her input has been recorded.

**Sticky Notes**
A useful technique is to give everyone 'Sticky Notes'. You want the larger ones ideally and felt pens, not ballpoint. You can then request that everyone 'Brain Storms' their ideas onto 'Sticky Notes'; one idea per page. This allows everyone to be involved early and reduces the influence of the noisier participants. You could then place these all centrally and allow the group to discuss and sort. After they have sorted the ideas, you could ask them to give a title to each category. This is more tactile and forces participants to move around and thus assists with keeping them engaged.

**SWOT**
The SWOT analysis is a more sophisticated variation on the line down the page where we record for a particular situation the:
- Strengths
- Weaknesses
- Opportunities
- Threats

It is a powerful way of displaying varied information, making it easier for participants to comprehend and thus assists moving towards an appropriate conclusion.

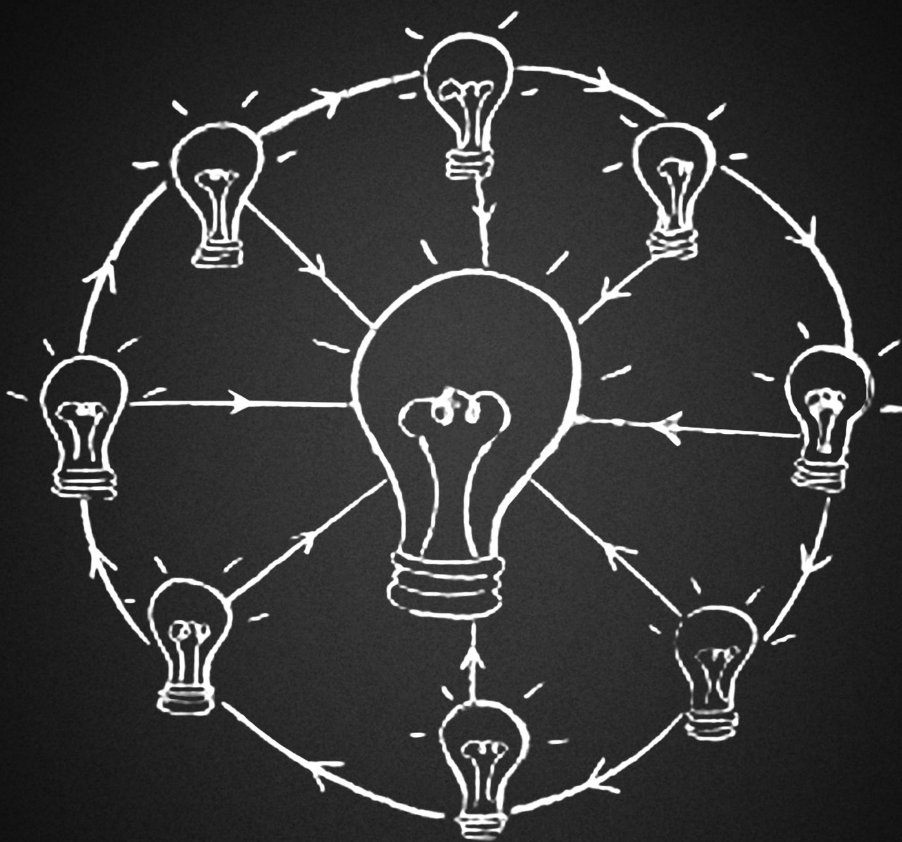
**Influencing vs Impartiality**
It is important to understand, and be very clear about your level of impartiality when you are facilitating. You are usually expected to be impartial unless otherwise stated, but it is acceptable to use facilitation as a means of influencing opinion, so long as all parties are aware of this objective. For instance, a sales person may use facilitation as a means of gaining a client's buy-in to the product being proposed, by asking a series of questions about the client's needs that bring the client to the conclusion that they need the sales person's solution. In this situation, it is clear from the roles of participants that the sales person will be trying to influence, rather than being totally impartial. Similarly, a project manager may clearly favour a certain approach to an issue, and use facilitation as a means of winning the buy-in of the project stakeholders to this approach.

It is often said that the best way to "sell" an idea is to let the other person think that is was theirs in the first place. The way achieve this is by asking the right questions, the answers to which will lead them to the conclusion you want them to reach.

In contrast to this, take the situation where a manager has made a decision on how to restructure their department. The manager realises that there may be resistance to their ideas, so calls a meeting and facilitates in an attempt to guide the team members to the conclusion that has already made. This is a dangerous way to use facilitation. In essence the manager has a dishonest motive, pretending to be an impartial facilitator when in fact trying to influence the team. A much better approach in this situation is to present the new structure and get the team to determine how it can best be implemented.

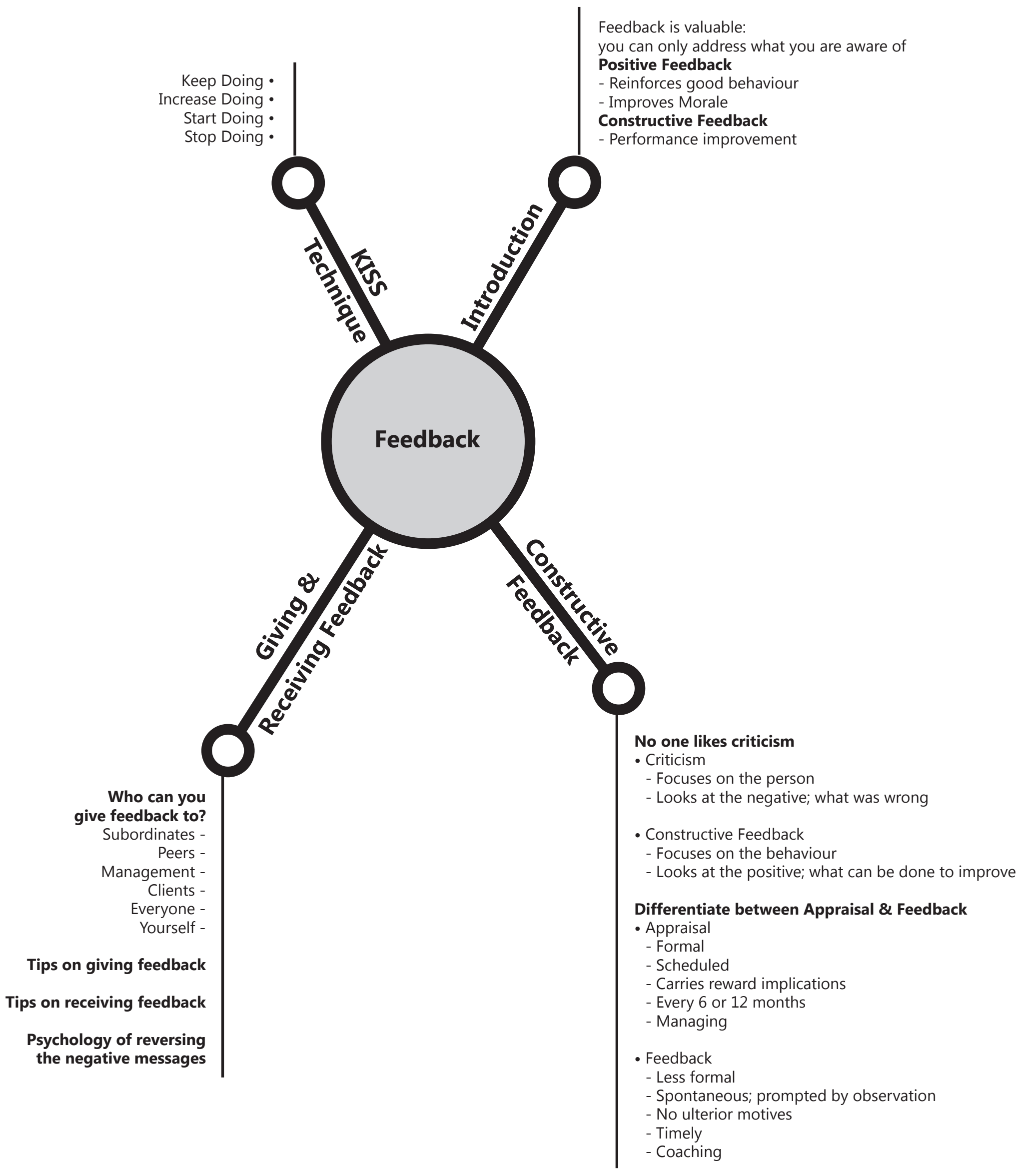
**Conclusion**

Facilitation is a powerful tool for gaining strong agreement and commitment. It uses 'Influence' to its full advantage. If a decision has already been made, then that should be stated to the group. People who pretend to be interested in other people's opinions are soon found out. The best facilitators tend to be the least intrusive. Often, the more work the group does, the more committed to the result they become. As with most skills the way to learn is to practice. Have the confidence to try; don't expect to know all of the answers, it is not expected of you.



# CHAPTER SEVEN

## Feedback


Feedback
Introduction
Feedback is valuable:
you can only address what you are aware of
Positive Feedback
- Reinforces good behaviour
- Improves Morale
Constructive Feedback
- Performance improvement
KISS Technique
Keep Doing •
Increase Doing •
Start Doing •
Stop Doing •
Constructive Feedback
No one likes criticism
• Criticism
- Focuses on the person
- Looks at the negative; what was wrong
• Constructive Feedback
- Focuses on the behaviour
- Looks at the positive; what can be done to improve
Differentiate between Appraisal & Feedback
• Appraisal
- Formal
- Scheduled
- Carries reward implications
- Every 6 or 12 months
- Managing
• Feedback
- Less formal
- Spontaneous; prompted by observation
- No ulterior motives
- Timely
- Coaching
Giving & Receiving Feedback
Who can you give feedback to?
Subordinates -
Peers -
Management -
Clients -
Everyone -
Yourself -
Tips on giving feedback
Tips on receiving feedback
Psychology of reversing the negative messages

# Chapter Seven
## Feedback – 'Helping to improve performance'

**Introduction**
Feedback is present in what we say and do. We give feedback throughout the day as we interact with colleagues, friends and family. It is essential that we are conscious of this feedback and ensure it is positive, in the form of compliments or guidance to improve behaviour, and not just negative criticism.

Feedback consists of:
- Self awareness; Understanding our own performance, our successes and failures, in terms of how others view us.
- Compliments; A powerful and positive method to reinforce good behaviour.
- Criticism; A direct attack on the individual which is unlikely to be taken well by the recipient.
- Suggestions; Positive support to alter a behaviour that is outside the desired norms for the business, group or family.

**Self Awareness**
***'Feedback is essential as you can only address what you are aware of'***

18th Century Scottish poet, Robbie Burns wrote:

***"O was some power the giftie gie us,***
***To see ourselves as others see us!***
***It wad frae monie a blunder free us"***

***Roughly translated he was saying:***
***'What a powerful gift to receive,***
***To see ourselves as others see us!***
***It would free us from many mistakes'***

The view we have of ourselves is not necessarily the way others see us. We can only change the way in which others perceive us, if we are aware of their view. This is why feedback is so valuable to us. It gives us the opportunity to change, if we wish to, on the basis of how we are perceived by others.

**Compliments**
***'The power of positive feedback'***

American author, Mark Twain, wrote:
***"I can live for two months on a good compliment"***

Positive feedback is a powerful tool that can make a major difference to workplace morale. If we receive genuinely intended and well-delivered positive feedback, it makes us feel good about ourselves. If we do this to the people we work with, morale improves.

**Criticism**
Franklin P Jones, a successful American business entrepreneur in the early 20th Century said:

***"Honest criticism is hard to take, particularly from a relative, a friend, an acquaintance, or a stranger"***

Even though the feedback may be true, if poorly delivered, it can be received with resentment. A positive delivery is essential to maintaining relationships. Criticism is focused on the person and is often not well received.

**Suggestions**
Constructive feedback focuses on behaviour, and if tactfully delivered, provides the recipient with an opportunity for improvement.

**Giving Feedback**
Who can you give feedback to?

**Everyone**
You can provide feedback to just about anyone. There are few situations in which it is wrong to give feedback providing it is:
- Sincere
- Tactful
- Well intentioned
- Well delivered

Always remember that there are risks involved, almost certainly with criticism and often with constructive feedback. You need to assess these risks before proceeding. Providing your CEO with the feedback that 'a different coloured tie may have improved his image' after a poorly received investor briefing, may not be well received, nor expand your career opportunities!

**Clients**
We may feel it is inappropriate to give feedback to clients. In some circumstances this may be true, but in many situations feedback is the very reason they have engaged us. As in other situations our feedback needs to be tactful, sensitive, constructive, balanced and assertive, but never aggressive

**Yourself**
Self-feedback is a useful self development technique. It can be difficult to be objective about your own performance, so it is worth having a practical yardstick to measure

against. One of the key questions is 'did you achieve your objectives?' It is another good reason why you should consciously articulate your objectives before taking any action.

**Positive Feedback**
As we discussed earlier, positive feedback reinforces good behaviour and can have a highly beneficial impact on morale.

Few organizations enjoy such high morale that they can afford to be complacent. In most companies the employees would like an improvement in workplace morale and many look to management to do something about it. What do we expect management to do? Mandate better working morale? 'The beatings will continue until morale improves!' Workplace morale is in our hands. Providing positive feedback where it is warranted will improve the morale and esteem of the recipient and costs nothing.

We all see countless examples in our working lives of colleagues and clients over-performing, but we are often so self focused that we fail to pay them the deserved recognition. If we start to do so, morale will improve and it becomes contagious, other people start doing it and the effect starts to grow.

**Constructive Feedback**
Constructive feedback provides the recipient with the opportunity to modify their behaviour and potentially improve their performance. It provides awareness only, 'To see ourselves as other see us'. The decision on whether to act on the feedback, is entirely the recipient's.

Constructive feedback looks at what could be done better and not at the individual, e.g. 'In order to shorten the presentation, I suggest you could look at changing the way costs are explained'

**Negative Feedback**
***'Who likes criticism?'***

Criticism focuses on the negatives, what you did badly, e.g. 'Your presentation was far too long and you made a mess of explaining the costs'.

Negative feedback should be used only very sparingly if at all.

## Why we tend to reverse negative messages

When you present a negative message to somebody, there is a tendency for it to inadvertently reinforce the negative. Elite sports coaches recognise this, they will provide reinforcement of the behaviour they are intending 'catch the ball', rather than focusing on avoiding the bad behaviour 'don't drop the ball'. This is because the brain remembers the last message but ignores the negative qualifier 'don't'. Thus the impact of 'catch the ball' will be a likelihood of

catching the ball, whilst 'don't drop the ball' will likely result in dropping the ball.
We see countless examples of this in practice.

- Motorcycle instructors get their students to focus on the gap they are trying to get through rather than the obstacles they are trying to avoid; the bike tends to follow the eyes.
- The wily old golfer standing on the tee will say to the novice 'don't hit into the water', increasing the likelihood of that golf ball coming to a wet end.
- In a workshop presentation, one participant provided the feedback to 'stop referring to the group as 'You guys'. The result was that at the next presentation there were multiple utterances of 'You guys' each followed by a wince. He knew he was doing it but just could not shift his brains focus. Alternative advice of 'use our first names' or 'Ladies and Gentlemen' may have avoided the difficulty.

**Individual Feedback**

Individual feedback is most powerful when delivered in a positive manner, with good self awareness and directed at the behaviour not the individual. Try using the following ideas.

- Do it as soon as practical
- Emphasise that you are coaching not appraising
- Do it face to face, in private
- Ensure uninterrupted time
- Ask the person to evaluate themselves before you offer your comments
- 'Reward' accurate and honest self assessment as a constructive development skill
- Top & tail constructive feedback with positive feedback
- Do it regularly, make it habit, not annual doses
- Focus on specific and changeable behaviour
- Invite feedback in return.

**Feedback vs Appraisal**

Feedback is not an appraisal and should be taken as a positive discussion around future behaviour.
Both appraisal and informal feedback have an important role to play in performance improvement. There are distinct differences in the nature of the two tools:

| Appraisal | Feedback |
|---|---|
| Formal | Less formal |
| Structured | Spontaneous. Prompted by observation |
| Carries reward implications | No ulterior motives |
| Every 6 - 12 months | Timely |
| Managing | Coaching |

They should compliment one another; neither can be as productive in isolation.

**Group Feedback**

## *'The KISS technique'*

Group feedback is best approached using the 'KISS' tool in the chart below, which focuses the discussion around behaviours and actions of the team.

**Group Feedback Sessions**

Try the KISS process:

For each members of the team, the group brainstorms what they should:

- Keep doing
- Increase doing
- Stop Doing
- Start Doing

The 'KISS' tool is very effective for both individual and group feedback and minimises the risk of feedback moving from behavioural attributes to personal criticism.

The idea is that on a regular basis the team or group set aside 15 minutes for a feedback session where all of the team will focus on one individual and make suggestions on what they should Keep doing, Increase doing, Stop doing and Start doing. Each time you run the session you focus on a different individual.

It sounds intimidating, but in practice the majority of the feedback is positive, keep doing and increase doing. The technique forces an emphasis on behaviour (...doing), and thus avoids criticism. It can be an excellent mechanism for providing continuous improvement, increasing morale and self esteem, whilst tabling some of those little niggles that develop in most teams, but rarely seem to get discussed and resolved.

**Receiving Feedback**

### "*Only <u>you</u> have something to gain*"

When someone offers you feedback, they are taking the risk of offending and/or jeopardising the relationship. There is often no tangible reward for them, in doing so. Their motive is to help you improve. So even if you do not agree with the feedback, accept it with grace and courtesy. Think of it as a well intended 'present' from a friend.

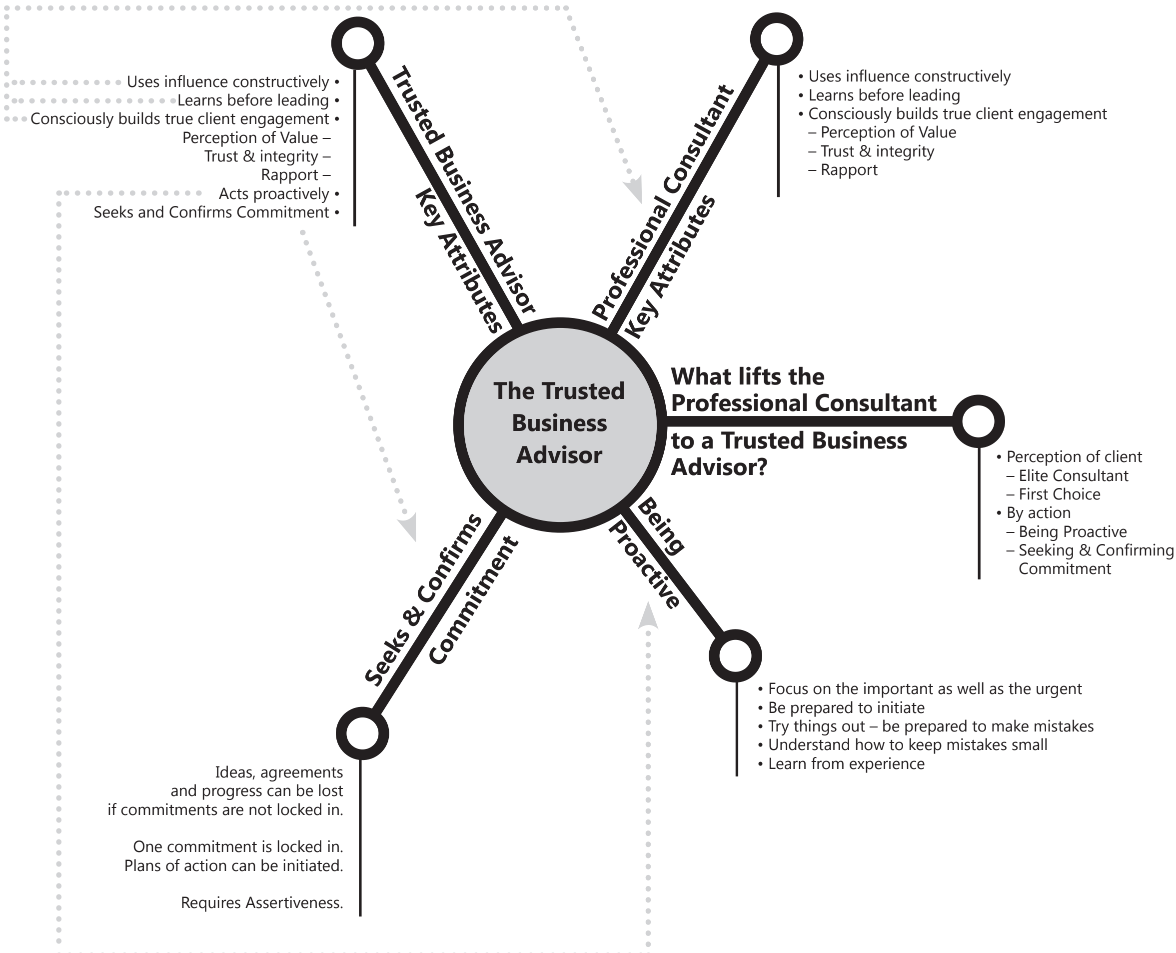
Remember the following when being given feedback.

- Assess the validity of the feedback to you
- Make it a dialogue not monologue
- Discuss alternative and specific suggestions
- Determine the benefits of alternative behaviour
- Do not shoot the messenger

Providing feedback is a difficult task that many people dislike doing. Well-structured and regular feedback will provide the foundation for building a solid and productive culture, across a group or business unit.

# CHAPTER EIGHT

## The Trusted Business Advisor


The Trusted Business Advisor
Trusted Business Advisor Key Attributes
Uses influence constructively •
Learns before leading •
Consciously builds true client engagement •
Perception of Value –
Trust & integrity –
Rapport –
Acts proactively •
Seeks and Confirms Commitment •
Professional Consultant Key Attributes
• Uses influence constructively
• Learns before leading
• Consciously builds true client engagement
– Perception of Value
– Trust & integrity
– Rapport
What lifts the Professional Consultant to a Trusted Business Advisor?
• Perception of client
– Elite Consultant
– First Choice
• By action
– Being Proactive
– Seeking & Confirming Commitment
Being Proactive
• Focus on the important as well as the urgent
• Be prepared to initiate
• Try things out – be prepared to make mistakes
• Understand how to keep mistakes small
• Learn from experience
Seeks & Confirms Commitment
Ideas, agreements and progress can be lost if commitments are not locked in.
One commitment is locked in. Plans of action can be initiated.
Requires Assertiveness.

# Chapter Eight
## The Trusted Business Advisor

In the chapter 'The Professional Consultant' we concluded that the key attributes of a professional consultant were:

- Consciously and competently uses Influence
- Constructively builds Engagement
  - Rapport
  - Trust & Integrity
  - Perception of Value
- Learns before Leading

### *What differentiates the Trusted Business Advisor from the Professional Consultant?*

There are two aspects to the answer. The first relates to how you are perceived by the client, the second is concerned with how you earn this status.

**The client's perception of the Trusted Business Advisor**
The Trusted Business Advisor is the elite of consultants. In the eyes of the client, they are the first choice. Indeed, in some cases, if the Trusted Business Advisor becomes unavailable the project will not proceed.

When your client's perceive you as a Professional Consultant, your input will be considered. You have not yet reached the status of 'indispensable'. This status needs to be earned with each client separately, because the status only exists as a perception in the client's mind. It is quite conceivable that one client sees you as indispensable, whilst another doesn't. Generally speaking, to achieve this status you need to have demonstrated exceptional value for that client.

Many consultants can demonstrate value that is readily acknowledged by their clients. This is especially true when their specialist expertise is in short supply and they are competent in delivery. This doesn't necessarily mean they have provided exceptional value. To be considered a Trusted Business Advisor, you need to have successfully demonstrated exceptional value through an entire project, from initiation to conclusion, including:

- Helping identify and define the key business needs
- Diagnosing the underlying root causes (rather than simply the symptoms)
- Being the architect of the chosen solution
- Implementing the solution, bringing in additional resources as necessary

Once you have achieved the status, it is usually relatively easy to maintain.

The key area is at the start of a project. You can be involved in the final implementation and perform very competently, but are still likely to be perceived as a 'Team Member'. It is essential that you are involved from the initiation of the project, working with senior staff on all relevant activities. Diagram below compares the Trusted Business Advisor with the Team Member,

**Trusted Business Advisor vs Team Member**

| Trusted Business Advisor | Team Member |
|---|---|
| Deals with the most influential people | Works with general staff in the client's organisation |
| Has good access to and influences 'Decision Makers' | Limited access to 'Decision Makers' |
| Helps define the business issues, root causes and appropriate solution | Assists in information collection and implementation of chosen solution |
| Opinion is sought by senior management | Any possible 'Value add' outside the project is<br>not considered |
| Most importantly – **LEADS** | Follows direction with little opportunity to lead |
| Once achieved, the position is relatively easy to sustain | Difficult to improve position from within the team |

**How you can earn Trusted Business Advisor status?**

In my experience, two major attributes distinguish the behaviour of the Trusted Business Advisor:

1. Being proactive; being prepared to take the initiate; promoting new initiatives
2. Always gaining agreement and commitment at each stage of a project to lock in progress

Many people play critical roles in a project, but only those involved at the outset regularly earn the status of Trusted Business Advisor. The key activity that differentiates the Trusted Business Advisor from the rest is the fact that the Trusted Business Advisor was the initiator. If you initiate the conversation, set the agenda regarding the client's key business issues, and take a proactive role in tackling a key business issue, then you are on your way to Trusted Business Advisor status. This may include facilitating the solution to a problem that the client was not able to do alone. If you wait for the client to call you with their issues, then they have already got past that critical first step. They have probably discussed this with someone else (a different Trusted Business Advisor). You may subsequently perform well on the initiative, and be perceived as a Professional Consultant, but that is generally it. In fact you may only be perceived as a Team Member, which is often a low cost option for non-strategic tasks.

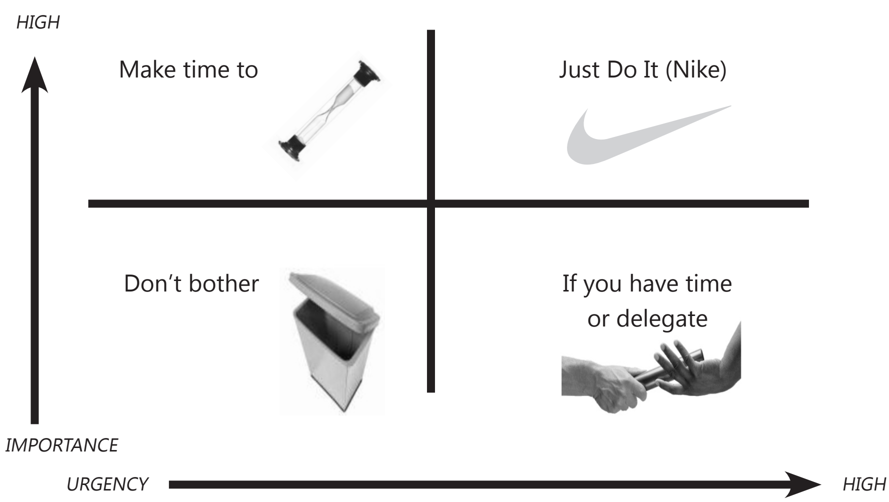
In order to progress in corporate life you need to add value, but most importantly you must attain visibility for adding value. This is much harder to achieve as a Team Member because you tend to be working at a less influential level of the organisation. The people, who need to be exposed to the value you bring, see little of your excellent work.
There is also a possibility that someone else is getting the credit for it.
That is why it is important to initiate and be proactive. It requires confidence, and the belief that you can make a difference. Reactive people, who lack that level of confidence, tend to believe in luck or fate – 'what will be will be'. Remember, you make your own luck.

As a good Team Member, you can perform a vital role well and continue to be selected for more work. Generally it will tend to be of a tactical nature, and you will have less control over your destiny. If you are proactive, and initiate the discussion at a senior level within your client's organisation, then you can be involved at a more strategic level. This is where you will be able to select the key initiatives that you get involved in and help select an appropriate team for the tactical pieces.

**Being Proactive**
A prerequisite of being proactive is the ability to manage your time and avoid being locked into reactive activities. Time is your most valuable resource and it expires very quickly. Once a moment has passed, the chance has gone with it. You may have used it doing something valuable or unimportant, either way it's gone.

It is worth breaking the allocation of your time into four quadrants based on the axes of Urgency (When required) and Importance (Value of activity) as shown in diagram below.

**Managing time**



Most of us would agree that top priority goes to the top right quadrant – High Urgency & High Importance. If you have actions in this quadrant they must take priority. If your house is on fire, it's both urgent and important that you leave! Interestingly, all the other items on your action list seem to go away when you have a real crisis. This is regardless of how urgent they might have seemed before.

Once all the High Urgency & High Importance tasks have been completed, the next decision is High Urgency & Low Importance versus High Importance & Low urgency. If you consciously consider it, this is the decision that causes you most anxiety. Unfortunately, many of us don't adequately consider it and default to the High Urgency & Low Importance tasks for a number of reasons including:

- If I don't do it now it will be too late
- I feel useful being busy
- I enjoy the challenge (adrenalin) of beating these deadlines
- Someone else has given them a timeline for me
- Many of these tasks are relatively small and simple so I can knock over a few of them quickly
- Someone has asked me for it and I want to show that I am helpful

Against each of these are equally valid counter-arguments:

| Reason to do urgent tasks | Counter-argument |
|---|---|
| If I don't do it now it will be too late | Does that matter if it was unimportant? |
| I feel useful being busy | We don't get paid for being as we get paid for outcomes. |
| I enjoy the challenge (adrenalin) of beating these deadlines | This might be fun, but that does not make it a productive use of your time. People doing this often end up burnt out. |
| Someone else has given them a timeline for me | If we don't timeline our own 'Critical Success Factors' then they will fall into 'Urgent and Important' anyway |
| Many of these tasks are relatively small and simple so I can knock over a few of them quickly | Effective Time Management is not just a case of getting things off our action list. There are always other tasks to take their place. If a task is unimportant, why waste time on it? Wouldn't you be better off starting on something important instead? |
| Some one has asked me for it and I want to show that I am helpful | Our desire to be seen as helpful (and liked) is understandable, but that may not be part of our job. Often these tasks are achieving other peoples' KPI/KRAs, but it is advisable to achieve your own before you start helping everyone else out. |

The fact is, there is no shortage of Highly Urgent but Low Importance tasks, and they can easily fill your entire day if you let them. They are usually reactive rather than proactive activities. They are usually urgent because someone else has put the urgency on them. They are often not even part of your role. They get onto your list easily because you don't need to think about them - someone else puts them on your task list for you.

Conversely, the High Importance but Non-Urgent tasks require you to think! What is the most useful thing you could be doing for your organisation today? Doing things right rather than doing the right things may give you some satisfaction because you are busy, but that is not working smart. Doing High Importance & Non-Urgent tasks can reduce the amount of High Urgency & High Importance crises that arise. This is because you are ahead of the game – you have done the planning and preparation to avoid panic. By definition the High Importance tasks are directly related to your key measurement parameters. Careers are built in the top left hand corner of the Time Management matrix – you don't get promoted, in most careers, for being the best at reacting. The more High Urgency and Low Importance tasks you do, the less time you will have to do High Importance activities. You will also get more of them as your colleagues realise you react positively to their requests. They will continue to feed you with the low value work, they don't want. When you push back they eventually take you off their distribution list.

The diagram below summarizes some of the key activities that fall into the four quadrants. If you are to use your time productively, it is worth considering how you manage Urgency and Importance.

*HIGH*

| **Primarily Pro-active** | **When your integrity is at risk** |
|---|---|
| Planning/Prevention<br>Relationship Building<br>Personal & Skills Development<br>Life Balance<br>New opportunities<br>Directly related to you KPI's/Goals | Meeting/exceeding expectations<br>Deadlines in Projects<br>Crises |
| **Trivia** | **Primarily reactive ; in your face** |
| Stuff | Not directly related to your KPI'/ Goals<br>Most mail, email<br>Some Phone Calls<br>Interruptions<br>Many Meetings |

*IMPORTANCE*

*URGENCY* *HIGH*

Being proactive means you think about making things happen, rather than waiting for someone else to suggest it. It means taking risks and sometimes making mistakes, although it can be argued that the biggest risk you can ever take in life, is never taking a risk. Successful people are often quoted to the effect that "mistakes are the way to success". If you are not making mistakes, it may well be that you are not doing anything. However it is important that you can recover elegantly from your mistakes. Try to:

- Get help early and keep the your mistakes small
- Avoid repeating the same mistakes (forgiveness wears thin)
- Learn from your mistakes
- Salvage the good – don't 'throw the baby out with the bath water'
- Take out insurance by keeping all stakeholders informed and involved in what you are doing

## *No Surprises!*

**Seeking Commitment**
Every day in corporate life, great value is wasted by a failure to lock in the progress that has been achieved. This happens because no-one makes the effort to gain agreement and commitment to a plan of action. Trusted Business Advisors are not wasteful with their achievements, they lock it in for the mutual benefit of all parties.

At every step of the process, Trusted Business Advisors gain agreement to what has been discussed to date, and commitment for the next steps towards the ultimate goal. This might be:

- Gaining the agreement from the client to the definition of needs, and commitment to the next steps in developing an appropriate solution,
- Securing commitment to the provision of resources required to commence the next stage of the project
- Agreeing to a time for a reference visit to another client who has implemented a similar solution
- Agreeing to the plan of action developed during a brainstorming workshop.

When we fail to lock in this sort of progress, it often gets lost. One of the great values of the Trusted Business Advisor is that they lock relevant parties into each plan of action. This is how initiatives are successfully completed. This is important for the aspiring Trusted Business Advisor, because they know that they only reach that status based on results. This means that initiatives must be completed, and you must keep your client focused on your initiative, in spite of all of the other things competing for their time.

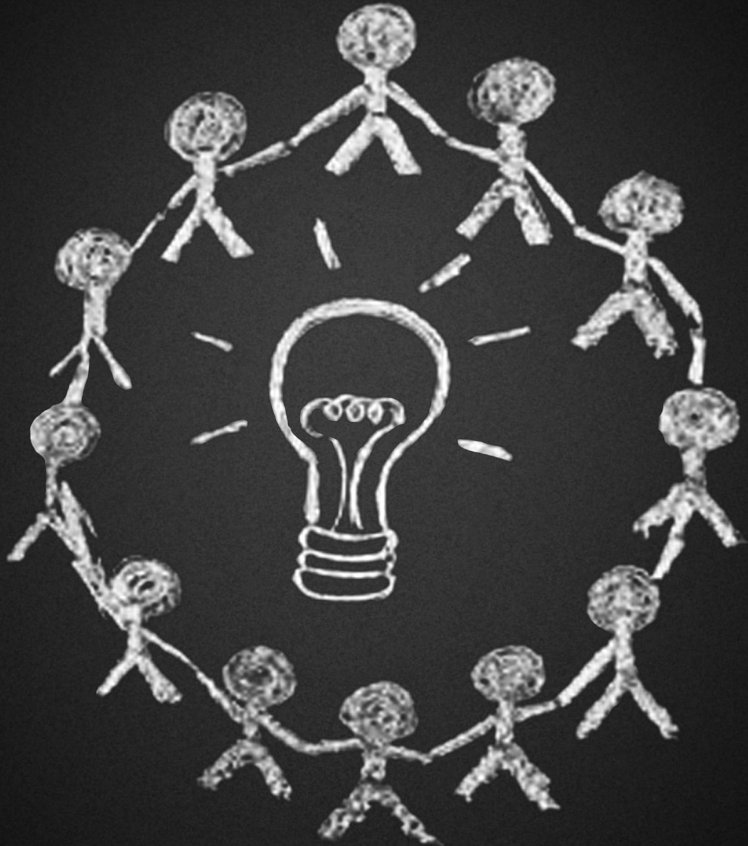
**Conclusion**

**The Professional Consultant:**

- Consciously and competently uses Influence
- Constructively builds Engagement - Rapport, Trust & Integrity, Perception of Value
- Learns before Leading

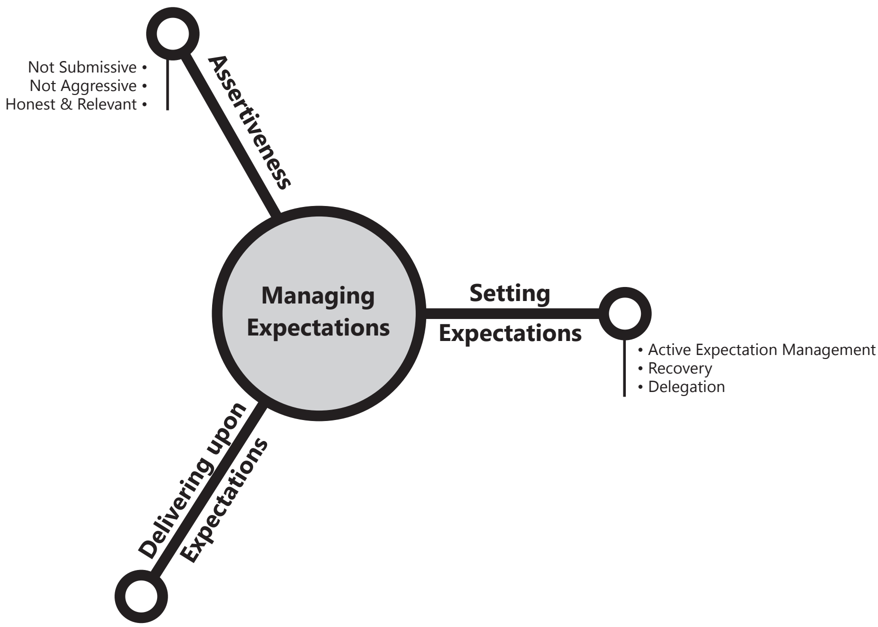
**The Trusted Business Advisor:**

- Possesses all the qualities of a Professional Consultant
- Demonstrates their added value by initiating, developing and delivering appropriate solutions
- Achieves success by being pro-active and leading
- Locks in agreement and commitment at every stage of the project



# CHAPTER NINE

## Managing Expectation


Managing Expectations
Assertiveness
Not Submissive •
Not Aggressive •
Honest & Relevant •
Setting Expectations
• Active Expectation Management
• Recovery
• Delegation
Delivering upon Expectations

# Chapter Nine
## Managing Expectation: Change from Villain to Hero whilst reducing your workload and stress

**Introduction**

There are two parts to expectation management
1. Setting the expectation
2. Delivering on the expectation.

If you fail to deliver on the clients' expectations, your credibility and integrity are at risk, and these are far too valuable to gamble with. Corporations throughout the world include in their mission and vision statements ideals like:
- To delight our clients
- To exceed our client's expectations
- To consistently deliver beyond the expectations of our clients

This is what keeps organisations in business. Continuing to conform to these ideals goes a long way towards retaining a loyal client base. Companies can invest many millions of dollars on improving their delivery capability to exceed their clients' expectations. Unfortunately the Marketing Department then also increases these expectations. An example of this might be; after striving for months to be able to deliver a '2 hour Loan Approval', the new marketing brochure promises 2 hour approval as 'the norm'. The two hours is the optimal performance and not the usual. They end up disappointing a large proportion of customers, and putting greater and more unreasonable pressure on the delivery staff. Of course the Marketing Departments must keep their products competitive and attractive to their client base. At a micro level you are faced with the same dilemma of maintaining an appropriate balance in the dealings with your clients.

**Setting Expectations**

The key is in the setting of expectations. At the point of delivery you rarely have more than 10-15% flexibility. If the reasonable quote for the job is $100, it is unlikely that you will be able to complete it for less than $85. If you reasonably allow 10 days for a task, it is unlikely you can do it in less than 8 days, and there is always a possibility that the job will over-run for reasons outside your control. In contrast, at the point of setting expectations we have almost unlimited flexibility. Of course clients may have demands, some reasonable and others less so, but we have the right to set what we believe is a reasonable expectation. This should include appropriate contingency to allow us to exceed the client expectations, in most cases. It is at this point, that we succeed or fail in client satisfaction. To be successful requires you to be thorough with your planning, including; contingency, dependencies, competing demands on resources etc. It is also necessary to exercise the assertiveness to maintain your position and not be bullied into unreasonable demands.

***"You can con a sucker into committing to an impossible deadline, but you cannot con him into meeting it!"***

Remember your credibility is at stake. It has been said that the easiest way to a more successful career, whilst spending less time under work pressure, is to become better at expectation setting. A little planning and assertiveness up front can save a lot of overtime and damaged credibility later. We sometimes simply need to say "No".

An extract from the American situation comedy 'Seinfeld' provides a perfect example. Jerry Seinfeld has turned up at the car rental depot to collect the car he has reserved:

| | |
|---|---|
| **Jerry:** | My name is Seinfeld; I have a reservation for a mid-size car. |
| **Rental Asst:** | I'm sorry, we have no mid-size available at the moment. |
| **Jerry:** | I don't understand, I have a reservation. Do you have my reservation? |
| **Rental Asst:** | Yes we do. Unfortunately we ran out of cars. |
| **Jerry:** | But the reservation keeps the car here, that's why you have the reservation. |
| **Rental Asst:** | I know why we have reservations. |
| **Jerry:** | I don't think you do. If you did I would have a car. See, you know how to take the reservation but you just don't know how to hold the reservation, and that's really the most important part of the reservation, the holding. Anybody can just take them. |
| | ...Finally the assistant comes up with a compromise. |
| **Rental Asst:** | We have a blue Ford Escort for you Mr Seinfeld. Would you like insurance with that? |
| **Jerry:** | Yes you better give me the insurance 'cos I'm gonna beat the hell out of this car! |

| | |
|---|---|
| **Expectation:** | set at time of reservation |
| **Pain:** | felt at point of delivery |
| **Outcome:** | client will get their revenge! |

**Active Expectation Management**

Expectations can be set passively. The fact that you did not actively commit to a task, does not get you off the hook when it comes to the perception of the client. Your previous performance can set precedents, which become expectations for the future. People will make assumptions that the absence of "No" means, "Yes". You, however, may be assuming that an absence of "Yes" means "No". You may have a point, but in the eyes of the other party you have let them down. To avoid risk and confusion you need to be very specific about what you will do, and equally specific about what you will not do, even when you are not directly asked. Do not let the assumptions of others put your integrity at risk.

**Recovery**
There will always be situations where, despite the best of; intentions, planning, assertiveness and active expectation management, things just go wrong. When this happens, reset the expectation as soon as possible. When people are given adequate notice of a problem, they can manage things to minimise the impact. They may need to reset expectations themselves, rework plans, adjust dependencies etc. If you give them adequate notice, they can mitigate most of the risks. They may even be able to assist you with additional resources. None of these options are available to them, when they find out after it is too late. You can help retain your credibility and reputation for delivery, even when things go wrong. You have to keep your client informed with progress and modify expectation early. Remember, as far as the client is concerned, you have still failed to deliver on your initial commitment. The bottom line here is, don't make a habit of having to reset their expectation!

***The golden rule is 'No Surprises'***

**Delegation**
Sometimes you can be left in the lurch by depending on others. Your ability to deliver can been impacted by the lack of delivery to you, by a third party. You can point the finger at the third party as much as you like, but that does not get you off the hook.

**Delegate not Abdicate**
Delegating parts of a job does not take you out of the loop. You are still responsible to your stakeholder. When you choose to delegate a task, you must try to ensure the third party is reliable. You need to actively manage progress, especially where you have no experience of their reliability. This will not necessarily mean you always get your delivery on time, but it may forewarn you of potential dangers, so that you can manage the expectation of your stakeholders.

**Delivering on Expectations**
To a large degree, your integrity is measured by your performance in delivering, against your client's expectation. If you have recently experienced difficulty in delivering on expectations, reflect on whether you have been setting these expectations realistically. Applying the techniques outlined above will go a long way towards making you successful in this area.

***Setting realistic expectations with your client and then delivering against these expectations makes you a hero and reduces your overall workload.***

**Assertiveness**

## Submissive vs Assertive vs Aggressive

John Clease, in the Management Training video 'Straight Talking', talks about the advantages and disadvantages of submissive behaviour. The advantage of submissive behaviour is that 'you avoid confrontation'. The disadvantages of submissive behaviour are:

- Your point of view is ignored
- Your rights are neglected
- You bottle up resentment
- You lose confidence
- Your hair suffers
- You make less of a contribution
- You become demotivated
- You feel undervalued
- You can never get a parking spot
- Your pets start ignoring you
- and so on and so on and so on

Submissiveness makes it very hard to handle difficult situations effectively. It also makes it very hard to prevent difficult situations arising. The tendency to avoid the issue, may simply postpone the inevitable, making the situation even worse. Submissiveness will tend to negatively impact work/life balance. It can also get in the way of any added value being 'visible' to those who should see it. Managing expectations often means having to say "No" and standing up for the right decision, despite the opposition. The faint hearted fail to ask for the commitment to the next phase, which invariably inhibits progress.

This is not to say that aggression is the answer. Aggressive behaviour may appear to achieve its ends, but it is short lived. True success requires the cooperation of others, and this will not be achieved by alienating them. Aggressiveness inspires fear and loathing. Revenge is the next stop on that 'Train Line'.

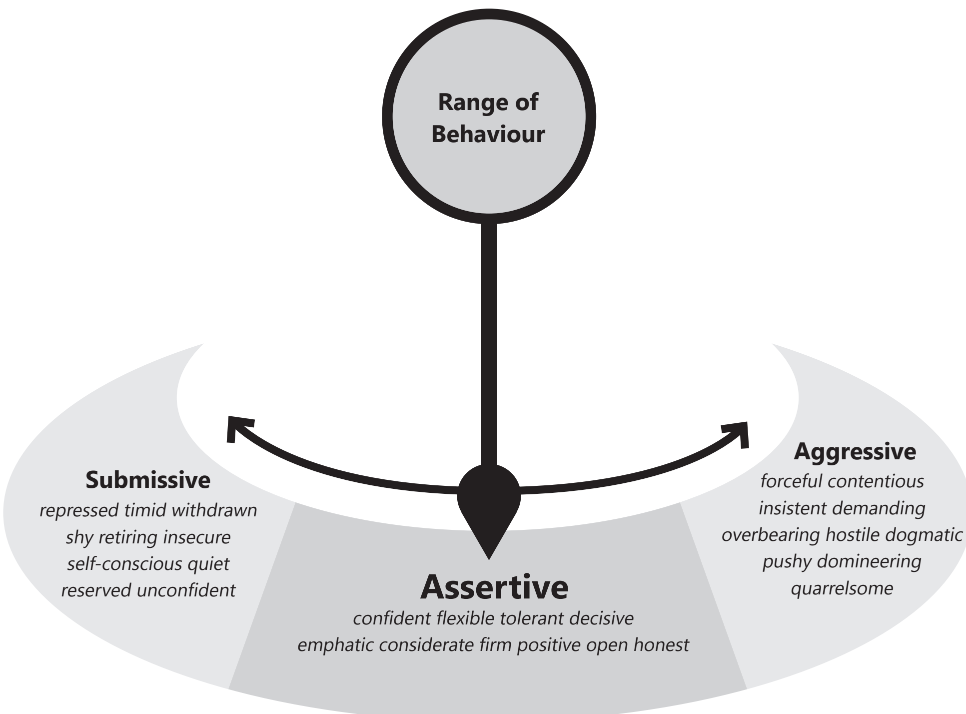
The middle road is to be Assertive, which is described as:

- Confident
- Self assured
- Flexible
- Tolerant
- Decisive
- Considerate
- Firm
- Positive
- Open
- Honest
- Emphatic

Assertive is not aggressive or rude. It is respectful to us, and others. It recognises that all of us have a point of view and are entitled to voice it. This needs to done tactfully and constructively to avoid an aggressive interpretation. Too often, submissive people get frustrated with their lack of progress. Eventually, they take the 'Bullet Train' across the spectrum to highly aggressive. This is rarely helpful or constructive. Assertive people do not suffer this frustration.

Assertiveness is a frame of mind. It is one worth getting into, when you are dealing with difficult situations. If you don't, aggressive people will take advantage of you. This is often to the detriment of the project and your reputation.

The following diagram shows this range of behaviours with the advantages and disadvantages of each approach. As can be clearly seen, Submissive and Aggressive attitudes have very little going for them whilst Assertiveness will most likely achieve success.



**THE BEHAVIOUR CONTINUUM**

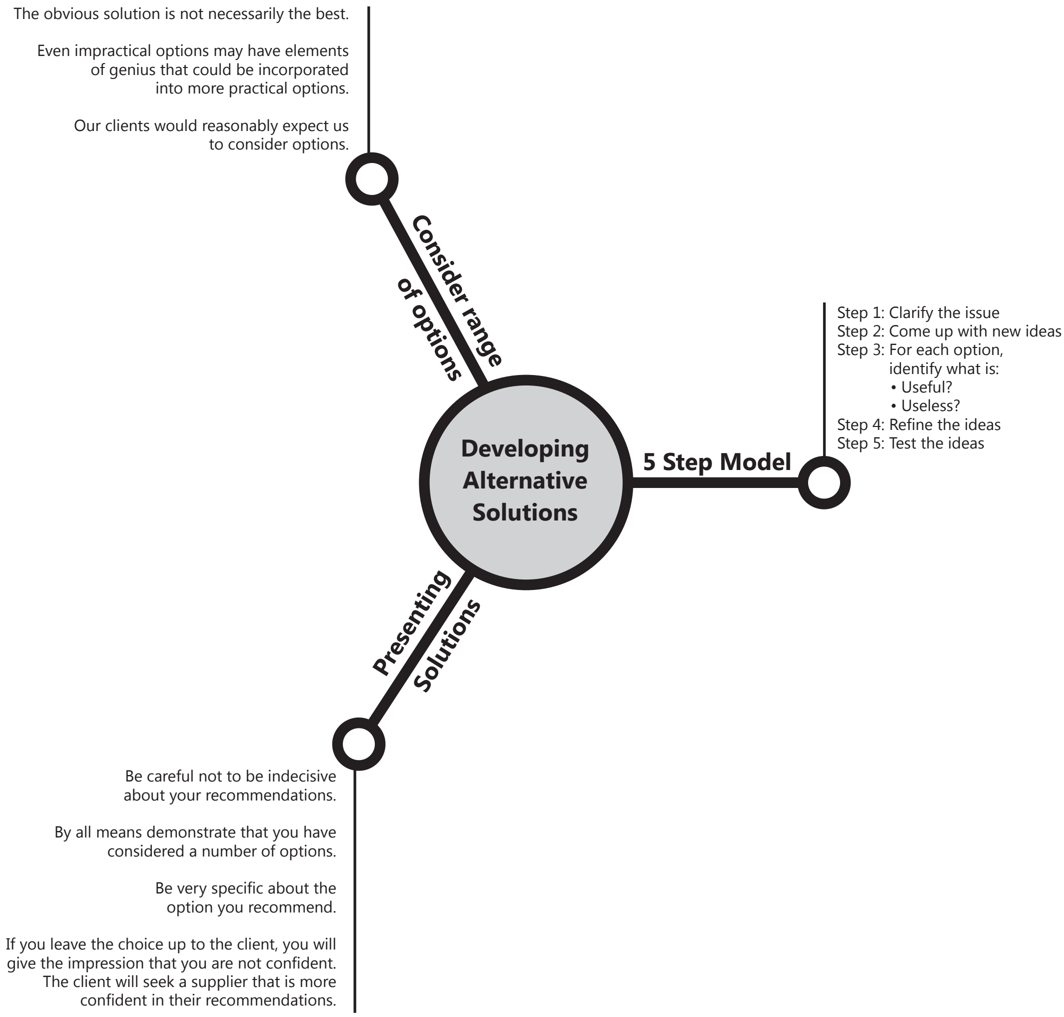
| | | |
|---|---|---|
| **ADVANTAGES** | | |
| • Avoids confrontation | • Gain respect<br>• Establish your point of view in a positive manner<br>• Take control without upsetting others<br>• Encourages constructive discussion<br>• Causes others to come up with new / different ideas<br>• Generates conclusions, agreed actions and commitment<br>and so on… | • Won’t get used as a door mat<br>• Possibly gain (a very short term) advantage |
| **DISADVANTAGES** | | |
| • Your point of view is ignored<br>• Your rights are neglected<br>• You bottle up resentment which can lead to a bout of uncharacteristic Aggression [See right hand column!]<br>• You lose confidence and make less of a contribution<br>• You feel undervalued and become demotivated<br>• You have trouble managing expectations<br>• You have trouble saying “No”<br>• You find it difficult to gain commitment from others<br>and so on… | • Can be perceived as Aggressive by some more Submissive people | • Gets peoples backs up<br>• Loses respect<br>• Causes others to switch off and not contribute<br>• Instills fear (and loathing) in more inhibited colleagues<br>• Encourages others to become aggressive to no advantage<br>• Inhibits constructive discussion<br>• Prevents the generation of new ideas<br>• Gains false commitment / agreement<br>• Loses support for your point of view<br>and so on… |
| **SUBMISSIVE** | **ASSERTIVE** | **AGGRESSIVE** |

**Useful tools**

Assertiveness requires confidence. A little planning for difficult situations can provide you with a range of useful ideas and options, as well as building your confidence. It is worth bearing in mind that you are not the problem. You are part of the solution and you should be on the front foot, being assertive. Often, anger is a symptom of the stress that others are struggling to cope with. People sometimes need to vent their frustrations, and sometimes you may be the sounding board on which they do their venting. If you can accept this as part of the role, rather than taking it personally, you will make far more progress. If you then move them towards a more constructive approach, once they have let off steam, then a resolution is well underway. To exchange blows in the heat of battle is fruitless. I am not condoning the aggressive behaviour of others because it is not acceptable. We do not live in a perfect world and life as we know it cannot stop just because someone steps out of line. At the end of the day, someone has to be constructive about resolving the issues. In the long term, those that do are the ones to benefit most.

# CHAPTER TEN

## Developing Alternative Solutions


Developing Alternative Solutions
Consider range of options
The obvious solution is not necessarily the best.
Even impractical options may have elements of genius that could be incorporated into more practical options.
Our clients would reasonably expect us to consider options.
5 Step Model
Step 1: Clarify the issue
Step 2: Come up with new ideas
Step 3: For each option, identify what is:
• Useful?
• Useless?
Step 4: Refine the ideas
Step 5: Test the ideas
Presenting Solutions
Be careful not to be indecisive about your recommendations.
By all means demonstrate that you have considered a number of options.
Be very specific about the option you recommend.
If you leave the choice up to the client, you will give the impression that you are not confident. The client will seek a supplier that is more confident in their recommendations.

# Chapter Ten
## Developing Alternative Solutions

**Objectives of this Chapter**

1. To stress the importance of developing alternative solutions to a given client need
2. To introduce a 5-step problem-solving process

**Introduction**

During the Engagement Skills Workshop (ESW) you have gone through the process of using various communication skills to gather relevant client information. This is so we completely and thoroughly understand the client's business needs, before attempting to identify a solution (Learning and Leading).

Open and probing questions help identify the scope of the problem. This allows the problem, and its impact, to be defined in a measurable manner. They also help the consultant to determine the "size of the prize" i.e. the potential benefits from determining the best solution to the problem for the client's context. In brainstorming alternatives there may be some impractical ideas, but there could be some very useful elements, able to be incorporated into a workable solution, that might not otherwise have been found.

As consultants, we owe it to our client to determine more than one potential solution. We need to demonstrate to the client that we have given appropriate consideration to the potential solution given the time-frame available in the plan. We must also demonstrate a clear logic path leading from problem to solution. It can be very powerful to demonstrate to our client that we have examined multiple options and determined which is best for them. Remember, the "obvious solution" may not be the best; it might not even be appropriate.

This chapter presents a 5-step process to take what has been learned from the investigation, and to develop a range of alternative solutions. This should lead to the selection of a solution that demonstrably meets the client's requirements.

The five steps are:

1. Clarify the Issue
2. Come Up with New Ideas
3. Identify What's Useful and Useless in each Idea
4. Refine the Idea
5. Test the Solution

**Step 1 – Clarify the Issue**

During the Workshop so far, we have discussed a number of communication techniques to help elicit relevant and complete information from the client. Ensure that your questions enable you to decide whether the "problem" that is being presented to you is a problem, or just a symptom.

For example: In the TOP GEAR Case Study, there are potentially problems with Research & Development. To find the root cause, we must understand the question, "Why does this symptom exist?" Having explored this subject during interviews and discussions, we might find that a clearer statement of the Research & Development issue is, "How do we manage product succession?"

**Step 2 – Come Up with New Ideas**

Developing new ideas is a risky business. A consultant needs to accept that new ideas will potentially have faults and are unlikely to be perfect. At this stage, this is OK. Don't try to get them perfect, and don't worry that others might criticise the ideas – we are trying to be creative!

Use brainstorming and other techniques to generate a range of ideas. Useful questions to ask are:

- "What would I do if there were no laws to govern my actions?"
- "What would I do if I were the boss?"
- "I know that I can't; but if I could, what would I do?"
- "What would my creative hero do?"

Do not evaluate your ideas yet – leave that until the next step.

Pursuing the Top Gear Case Study further: some ideas to solve the Research & Development (R&D) issue of "How do we manage product succession?" could be:

- Jo Crocker to spend more time on R&D
- Jo Crocker to be full-time on R&D (i.e. relinquish general management role)
- Increase investment in R&D
- Establish a research alliance with the local University
- Establish a "council" of users to gather their requirements
- Establish an R&D alliance with a competitor

**Step 3 – Identify what's Useful and Useless With Each Idea**

In evaluating and refining the various ideas generated in the previous step, it is vital to involve the client. It is almost certain that the client will have a better understanding of their environment, than you can gather through a set of interviews and discussions. The client may be familiar with the history of previous changes; when they were made, what those changes were, the reasons that the changes were made, and the success of the change.

Additionally, it is politically wise to involve the client: they must "own" the solution that is finally recommended. The best way is to involve them, is through the process.

Assess each aspect of every idea to assess how much merit it has, and how that merit can be taken and measured. Often, you will find that one aspect of an idea has merit, but the overall idea may not have as much to offer. Be positive, and keep asking how this idea can be improved; rather than looking for ways to eliminate the idea. A negative frame of mind will severely reduce your chances of developing an innovative solution.

Progressing with the TOP GEAR Case Study: one of the ideas was "to increase investment in R&D". Let's evaluate how? Some possibilities might be:

- More of Crocker's time (up to full-time) to develop the product – or to devise a new product. Note that this might impact on management time
- Recruit R&D staff from outside, including headhunting from competitors. To whom would these people report? What would the organisation structure look like?
- Develop internal staff. Is there enough time? How would they be organised?
- Use the local University as the R&D team. Is there enough time? How will they be funded? Does this change the very nature of TOP GEAR's product philosophy?

**Warning:**

Most consulting engagements have a plan, which allows a specified amount of time for each phase of the consulting project. In developing a range of alternative solutions, and examining the "fit to requirement", there is a risk of appearing to the client to be indecisive; often referred to as "analysis paralysis".

It is important to manage your ongoing client involvement, and the project time, to ensure that you maintain your credibility. Key to this is meeting project milestones.

**Step 4 – Refine the Idea**

Again, the full involvement of the client in refining the ideas and making them practical for the client's environment is vital.

Keep the useful issues and add other ideas that may increase the value to the client. When you have done this for all ideas, mentally throw away the ideas that are useless, and keep the ideas that provide or contribute to the solution. Some things to consider:

- To qualify as "absolutely useless", an idea must either be immoral, illegal or impossible.
- To qualify as "most likely useless", an idea must be cost prohibitive or culturally incompatible with the client's organisation.
- To qualify as useful, an idea must solve the problem. (Note that this is not as obvious as it sounds!). Eliminate any idea that will not actually solve the problem.

For instance, with the TOP GEAR R&D issues:

- If Crocker undertakes full-time R&D, who will manage the company? Politically, would this be acceptable to Crocker? Or to the Board?
- What if a phased transition plan was implemented to ease Crocker out of management and into R&D over time (say, 12 months?)– e.g. via appointment of a COO?
- What if some of the brighter engineers were transferred into a R&D group reporting to Crocker to undertake specific R&D tasks under Crocker's direction. What if TOP GEAR also engaged the local University to assist?

**Step 5 – Test the Solution**
By this fifth step, you will have identified a preferred solution. The preferred solution must be tested thoroughly to ensure that it meets the business requirements. It must also be tested to ensure that it can be delivered politically and financially. Some useful questions to consider include:

- Does it meet the client's objectives and solve the problem?
- Have we considered the advantages and disadvantages relative to the client's critical success factors?
- Is the cost reasonable for the value (benefits) delivered?
- Has the client got the right resources (people and money, and finance)?
- Can we get the client's commitment? How? (WIIFT - What's In It For Them?)
- Have we identified potential resistance? How will this be overcome?
- Do we understand the risks and mitigations?
- What other issues must be considered to successfully implement the solution?

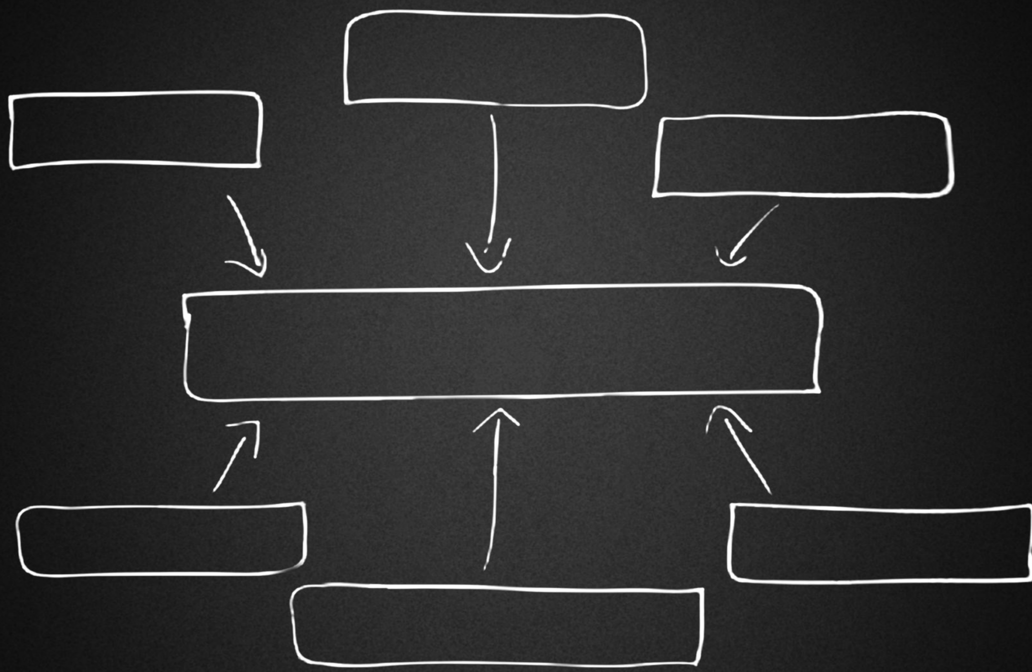
Once these questions have been considered, there are two other fundamental questions that must be answered for a recommended solution to business managers:

1. How do we initiate the project to implement the recommended solution? (What actions are required to get the ball rolling?)
2. How do we pay for the project – from initiation through to completion? (Where does the money come from to start the project, and how do the ongoing benefits fund the project as it proceeds through its phases?)

**Conclusion**
This chapter has presented a relatively simple, 5-step process for Developing Alternative Solutions within a consulting engagement. The process allows a consultant to work with the client to determine a recommended solution. It allows us to demonstrate that a range of solutions have been considered, and the most appropriate solution chosen. That is, the solution that best meets the client's business requirements.

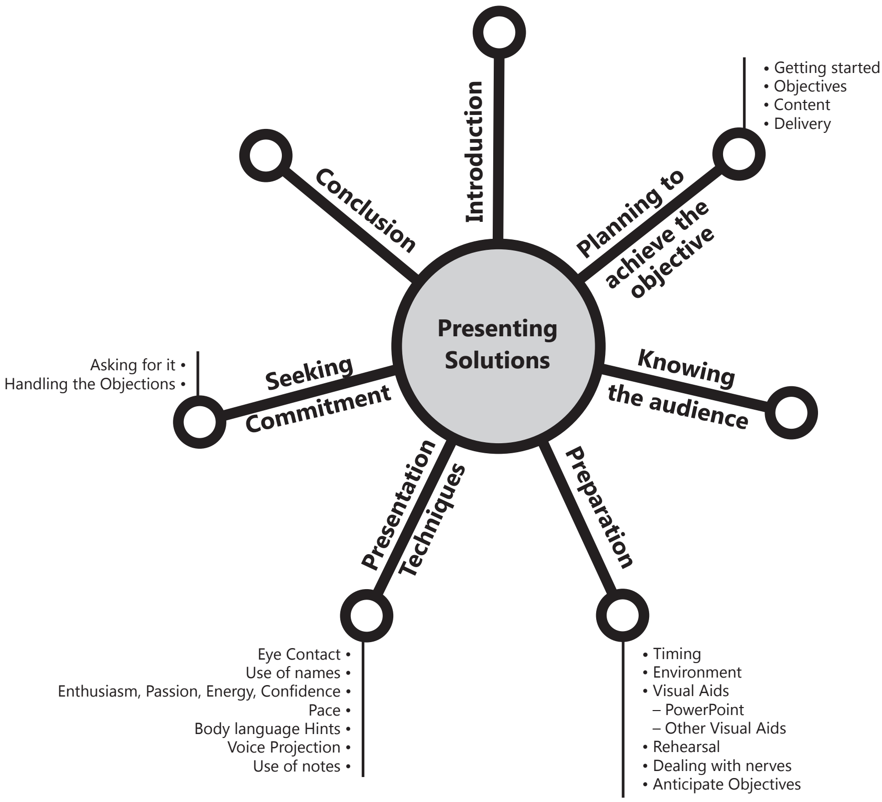
Please be aware that consulting engagements have a limited amount of time for determining solutions. Be careful not to fall into the trap of "analysis paralysis" i.e. spending too much time determining alternatives and considering which best meets the business requirements. Do the best that can be done, in the time available. Please make a very clear recommendation on the proposed solution. Explicitly tell the client the solution you have recommended, and the reasons for making that recommendation. Depending on circumstances and time, you may also wish to indicate the range of alternative solutions examined, and the "pros and cons" of each alternative. This can demonstrate your thoroughness as an advisor, but ensure that it is not seen as hedging your bets. Determine and tell the client how to get the project started. This should include the people and other resources needed.

Finally, there is no such thing as a “free lunch”. This includes any solution to a business problem! It is important that we determine and recommend how the client can fund the recommended solution, and what effect it is likely to have on their cash flow.



# CHAPTER ELEVEN

## Presenting Solutions


Presenting Solutions
Introduction
Planning to achieve the objective
• Getting started
• Objectives
• Content
• Delivery
Knowing the audience
Preparation
• Timing
• Environment
• Visual Aids
– PowerPoint
– Other Visual Aids
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Presentation Techniques
Eye Contact •
Use of names •
Enthusiasm, Passion, Energy, Confidence •
Pace •
Body language Hints •
Voice Projection •
Use of notes •
Seeking Commitment
Asking for it •
Handling the Objections •
Conclusion

# Chapter Eleven
# Presenting Solutions: Gaining commitment from the client

**Introduction**

We have spent a great deal of time 'Learning' about our client. We have been building engagement (rapport, trust and integrity), and understanding their needs, constraints and environment. We then identify a range of solutions that would address their issues and selected the one most appropriate to their particular situation. We now move into the 'Leading' phase. This is where we offer our solution and start to deliver on the added value we have promised. This has the potential to be a dangerous phase. It is the point where the client will gauge how well we have listened, and how capable we are in translating our specialist skills into practical solutions for them. This is an 'iterative' process that runs throughout the life of our engagement with a client. This is regardless of whether that engagement is project based or business as usual, or whether we are an internal or external service provider.

It is easy to visualise this as the standard sales process in a project based, external consulting environment. It is equally relevant to any type of subsequent delivery phase. We need to demonstrate our understanding of the requirements identified during the previous phase of work. We need to demonstrate and get agreement that we have reached the desired standards and milestones (sign-off). We need to gain the clients commitment to the next phase of work. In an internal situation this process may be led more by the internal client, but not necessarily. Few of our clients would resent the additional momentum generated by their internal service providers taking a more proactive role. It is equally valid in small and micro-projects, and business as usual (albeit less formally). Stakeholders need regular updates on progress. We need to demonstrate that we are still on the right track and have a plan of action going forward, before they commit further resources. This is the regular cycle for much of our corporate life.

**Planning to achieve the objective**

Whatever you do in the presentation, it should be for one goal. That goal is the objective or desired outcome. You could talk about a lot of things. If they don't take you to the outcome you want, don't bother. Tell the audience where you are going at the start, show that you are in control and comfortable. You will often be asking to be in charge of more than just a presentation. At the end, summarise what you have said, and ask for the audiences commitment to what you need. Make sure everyone knows what is expected of him or her. Be clear about what you will and won't do.

**Getting Started**
One of the difficulties in preparing a presentation is getting started - the blank canvas syndrome. If you ask any artist or writer, the first brush stroke or sentence is the most difficult.

**Option 1**
- See what slides relating to the topic you already have
- Beg, steal or borrow additional slides from colleagues
- Develop a script that will tie them all together

**Option 2**
Start with a Call Plan and constructively build your presentation around your objectives, the needs and expectations of the client, and your proposed structure for the meeting.

Option 1 is a task-based approach and whilst you may end up with an interesting presentation, the likelihood of it achieving the real objective is based purely on chance.

***If we say enough stuff there is a chance that some of it will be the right stuff!***

Option 2 is a outcome focussed approach. We focus on what we are trying to achieve with this client, in this event. We then set out to fulfil this objective. The presentation will be shorter, more concise and will have a strong chance of success. Why ramble on for 2 hours and hope to achieve something. Why not spend 20 minutes on the topics that matter, with the specific aim of achieving your objective?
Blaise Pascal famously wrote,

***" I'm sorry I wrote you such a long letter; I didn't have time to write a short one."***

You owe it to your audience to put in the effort to make the message clear and concise. This also gives you the greatest chance of success.

**Objectives**
What is your objective, and how will you measure its achievement?

The primary objective is to gain agreement to your recommendations and commitment to starting the next phase. You will not get this commitment unless you also achieve the secondary objective of demonstrating that you have adequately completed the previous phase of work.

The measurement will be simple. You will either gain the commitment you are seeking, you will partially get there (i.e. conditional agreement) or you will fail. In each case your plan of action should be reasonably clear.

**Content**
What content do you need in order to achieve this objective? This is quite different from "What slides do I have available?"

To decide on the content and final structure of the presentation you can start from an imagined satisfactory conclusion and work back asking the question "How did I get to this point successfully?"

This list will vary for every presentation dependent upon the specific objectives and circumstances, but the process is valid for virtual all presentations. This is what the presentation needs to cover for the client to be able to provide you with the agreement and commitment you are seeking. No matter how much other information you have, there is no time for it unless it materially contributes to the key objective. Extra information becomes a distraction and wastes the client's and your limited and valuable time.

***Determine the content based on what is needed to achieve your objective, not on the presentation material available.***

Before you can make many of your planning decisions, it is essential that you know who will be in your audience and their respective roles. You must determine:
- Who is going to be there?
- Who are the key players?
- What will be their roles during the presentation?
- What do we know about each them?
- What personality quadrant are they from?
- What are their hot buttons?
- What are their danger areas?
- What have they told us that would be worth reiterating?
  - This helps to gain agreement and demonstrates that you have been listening.
- How can we tailor the presentation to reflect their preferences?

**Style of delivery**

***How will you perform best?***
***More importantly, what is the client's expectation?***

Will you present standing in front of your audience, sitting with them or a combination of the two? Do you feel more confident standing at the front or seated around a boardroom/round/square/coffee table? Which method will make the stakeholders feel most at ease? What ever you decide ensure both you and the client are comfortable with the approach.

What visual aids will you use? PowerPoint is not mandatory! It may be the accepted standard, and as such it might be the low risk option, but consider some other options;

- Whiteboard
- Flip Charts
- Hand-outs
- Video
- IT system screen layouts / operation
- 'Solid' visual aids (e.g Products/Manuals/Models/Everyday items)

PowerPoint is a powerful presentation tool but it can tend to dominate if you let it. The presenter should be the key focus and not the slides. You should aim to differentiate your presentation and make it memorable, not merely conform in order to avoid the risk of rocking the boat.

**Preparation**
None of the following hints on preparing a presentation are ground breaking. Indeed they may seem quite trivial when you are up to your ears in finalising content and visuals etc. Surely these are tips for beginners not professionals. Wrong! Quality is about doing simple things consistently. These are the simple things that professionals do consistently well, which is what makes them professionals. An absence of these things shows up the unjustifiably confident, or complacent, as amateurs. It's Conscious Competence over Unconscious Incompetence.

**Timing**
A time limit is often imposed on your access to stakeholders and is usually rigidly adhered to. There's not much point doing three-quarters of a brilliant presentation, if you fail to ask for commitment because you ran out of time. Expect and allow time for interruptions and questions. In a large forum you might ask the audience to hold questions until the end, but with a smaller group of senior stakeholders it is unlikely that they will comply. It may even be counter-productive. The last thing you want is for an important stakeholder to misunderstand a key point early on, and sit stewing on it or switching off until the end of the presentation. You need to nip it in the bud, and keep everyone with you all the way.

Having determined the time you have available, it is a good idea to allocate set amounts to each section of your presentation. This should include time for questions, any planned discussion, and an allowance for contingencies. When you come to the presentation:

- How will you track time?
- If you have a designated timekeeper how will they communicate with you?
- What are you prepared to jettison in order to reach your objective if you get delayed or even derailed by unexpected discussion?
- How will you adjust if the client cuts your allocated time slot?

**Environment**

Ensure all aspects of the venue will be correct well before the presentation. The following is a checklist of the points that are often missed leading to a less than satisfactory performance.

- When will you gain access to the venue for set-up?
- How will the room be arranged?
- If you have the opportunity to make changes, how do you want the room arranged?
- If you have the choice, where do you want individuals to sit?
- If not on their premises, how are the participants getting to the venue?
- How well do the ergonomics work? For example,
  - Can the speaker reach the PC to change the slide without walking across the projector beam?
  - If a colleague is controlling the PC, how will you indicate your needs (next, previous etc)?
  - What will be the angle of the sun? Will it be a problem? Should the curtains be open or closed?
  - Where are the light controls and power points if needed?
  - Have you arranged for a projector, whiteboard, white board pens and rubber, flip chart stand(s), flip chart paper and pens, pens and paper for audience and any other visual aids as required?
- What refreshments are you going to provide, when and how?
- Is there a phone in the room and how can calls be diverted?
- Are there likely to be any major disruptions and how can they be avoided.

**Visual Aids**

The central focus of a good presentation is the speaker, not the visual aids. We often refer to the slides or flip charts as ‘the presentation’, they are not, they are only the visual aids. There is much more to a presentation that just the visuals, and when people forget this, sub-standard performances result. Nevertheless they are an important part of the presentation and worth consideration.

**PowerPoint Slides**

PowerPoint can provide very slick, professional visual aids, but is not mandatory. If you are going to use it avoid the common traps:

- It is a visual medium, so unless there is a specific reason for a slide, don’t bother.
- Try to be more imaginative than just text - a picture tells a thousand words.
- Don’t put too many messages on one slide. ‘If it won’t fit on a tee shirt it, it shouldn’t fit on a slide’
- Remember PowerPoint is a visual aid, not the presentation. Avoid overuse of slides so that they become the central focus in place of the presenter.
- Don’t put the full story on one slide. It not only overcrowds the visual, but it leaves the speaker with little to say other than what is already written on the slide. Intelligent audiences can be offended by the suggestion that they can’t read.
- Slides should enhance your message not repeat it. Use slides to develop your topics and not just list the points you are making!

- When turning your back to point out a feature on the screen, understand that you lose eye contact and your voice is now projected away from the audience. A helpful hint is TTT, Touch (the screen), Turn (to face the audience again) and then Talk.
- Bring a back up copy of your slides, and arrange for a replacement PC, Projector, etc. Have a contingency plan for anything that could go wrong. Even a hard copy in case of power failure.

**Note:**
PowerPoint is sometimes viewed as an excellent report-writing medium. From a production point of view, wouldn't it be convenient to present the presentation and leave hard copies of the slides behind in the form of a report? No! A report and a presentation are two distinctly different documents, and one or other will be dramatically compromised if you try using one for both purposes. The report must stand-alone and make sense to the reader with no external intervention. The slides are simply a visual aid to the storyline delivered by the presenter. Massive modification is required to make one work effectively for the other.

**Other Visual Aids**
Whilst PowerPoint slides have become somewhat of a standard, other mediums have distinct advantages:

- Being different - often we are trying to differentiate ourselves
- Can be modified easily - you can grab a pen, append to, or change a flip chart in flight much more effectively than modifying a slide. You can even offer the pen to the client to append/amend it themselves and start gaining their ownership of the information
- Being more tactile – 'Solid' aids can be manipulated and even handed around the audience
- More personalised - when a flip chart bears your clients logo they can see that you have created that chart specifically for them. You can't simply replace their logo for the next client.
- A whiteboard diagram that you are prepared to build in front of the client demonstrates your confidence and capability far better than a slide that was prepared earlier.
- Some people are becoming tired of PowerPoint slides and see alternatives as a breath of fresh air. There is a huge range of 'alternative' visual aids, which can be used to replace or supplement PowerPoint slides. The purpose of a visual aid is to add more impact to the point you are making. A variety of visual aids can demonstrate creativity and certainly add interest. Some alternatives are:
  – White Board, either pre-drawn, developed in flight or some combination
  – Flip charts, either pre-drawn, developed in flight or some combination
  – Hand-outs
  – A book held up when you are quoting a source
  – A sample of the product you are offering where appropriate
  – Props that can illustrate points or analogies

I once saw a presenter produce a pair of running spikes to demonstrate his message. He was showing that competitive advantage, in this case lighter weight and grip, could be attained relatively cheaply. He went on to show that it is not a sustainable advantage as all other competitors could buy the same. Sustainable competitive advantage is only attained through consistent training and fitness.

John Houseman in the Brain Power video uses your watch as a visual aid to illustrate a key point.

- Original ideas
  I once heard of an apparel company that transferred their entire set of slides onto tee shirts and lined them up on a clothes rack. The front tee shirt became the current slide, and then moved to the back of the rack when finished with to reveal the next in line.

In general the same hints apply when using these visual aids as with PowerPoint slides. Don't try to say it all with visual aids – the speaker should develop the message.
Visual aids should enhance your message not replace it.

**Rehearsal**
Many people claim that they prefer not to rehearse, however most perform better on the second or third iteration. The reluctance to rehearse is often embarrassment, fear of critical feedback or lack of time due to poor planning.
If we remember the breakdown of: Words – 7%, Tone of Voice – 38%, Body Language – 55%, then spending all our time writing doesn't make sense. Rehearsal checks that your presentation is likely to achieve its objectives, irons out those little glitches that only appear when you actually say it out loud, tests the timing and helps to word craft the difficult bits. Ensure the opening and close are especially well rehearsed and have impact. They are the critical parts. "I suppose we better start" and "Well that's it then" are not good examples of opening and closing, but they are often heard.

For important presentations, it is worth getting some volunteers to role-play the audience so you can get a feel for the types of objections that may be raised. Ideally these people should know the audience member they are playing. It is after this rehearsal that you rethink the presentation to avoid distracting objections. Some objections of course are welcome, as they give you the opportunity to answer them. Anticipate possible objections and plan how you avoid or handle them.

**Dealing with nerves**

***Don't be surprised if you feel nervous about giving a presentation, you should be!***

Worldwide studies have shown that public speaking is right at the top of our list of greatest fears - ahead of death. As Jerry Seinfeld, the American comic points out, "This means that the guy giving the eulogy at the funeral would rather be in the coffin!"

These nerves are the natural Flight or Fight response of our body when facing a major challenge, and the adrenalin thus released, provides us with additional energy to perform better. If you are not nervous, you will not perform to your optimum. The key is to control the nerves and channel that energy into your performance.

Rehearsal will add confidence, particularly with the opening statement. Once you get past the first few minutes the nerves usually go away as you are absorbed by the task, but if you bumble and stumble over the first few lines it can be most off putting for both speaker and audience. Get your opening statement word perfect.

We often are concerned that we will make a fool of ourselves; that the audience is waiting to see us fail. Invariably the opposite is true. The audience wants to see you succeed, they are on your side, and they are hoping for a good presentation. They don't want to waste their time or be embarrassed.

**Presentation Techniques**
There isn't a presentation method that will guarantee success every time, but there are some well-proven techniques. These will make a difference for presenters of any level of experience.

**Eye Contact**
Eye contact is essential to retain the interest of your audience and convince them of the sincerity of what you are presenting. When we lack confidence we tend to look away, as if seeking inspiration from the heavens, floor or walls. Keep your key audience members involved with your eyes.

**Use of Names**
When you are presenting to a group of around eight of less, addressing audience members by name will improve your relationship and acts as a powerful way of keeping them involved. This is so much better than referring to them as 'you guys'!

**Enthusiasm, Passion, Energy, Confidence**
Anita Roddick, founder and former CEO of Body Shop said "We communicate with passion, and passion persuades". The audience will reflect your levels of energy, so if you are lacking in enthusiasm, so will your audience.

**Pace**
When we are nervous, we tend to talk more quickly. This conveys a vibe of nervousness to the audience, and detracts from the credibility of the speaker. Slowing down your pace and inserting pauses can help convey an air of confidence. Take a pause before answering questions and handling objections, even if you don't need it. This lends maturity and credibility to your answer.

**Body Language hints**
Slowing your diction can reduce energy levels. How can we keep the energy levels high, whilst slowing the pace? Using your body to be expressive, particularly arm and leg movements can replace the energy that slowing the pace sacrifices.

**Voice Projection**
When you are presenting you are not in conversation. You need to lift and project your voice a notch or two so that you are clearly heard. This also provides the energy and confidence that makes your message more convincing.

**Use of Notes**
Most people have no objection to a speaker referring to notes during their presentation. This doesn't including clinging on to them, like "Linus's" blanket. Anything in your hands (pens, pointers etc.) stops you gesticulating and closes the body down. If you need to refer to notes, have them to the side. At the appropriate time, walk over and read them in silence. Start talking only when you are making eye contact with the audience.

**Seeking Commitment**

## 'Ask for it'

Progress usually requires commitment, and if you don't ask for it, it is rarely forthcoming. It doesn't need to be as harsh as "Please sign here", there are easier ways of asking such as:

- "Do you support these recommendations?"
  Then after you gain the clients agreement,
  - "What are the next steps to formalising this agreement?"
  - "When would you like us to start?"
  - "Who needs to sign off on this?"
  - "How do we take these recommendations forward?"
  - "Do you approve of these suggestions?"
  - "When can we meet to discuss the next steps?"
  - "Who will be working with us to implement these changes"

**Note:**
If you wish to ask directly for a commitment, you should use a closed question. A question that leads directly to a "Yes" or "No" answer. If "Yes" you are in business. If "No" you have more work to do. You will need to understand the objections and handle them.

If you do soften your request to an open question (e.g. "When do you want to start?"), it is likely you will still have to ask a closed question to get their commitment (e.g. "Then will you be in a position to sign off by Friday?")

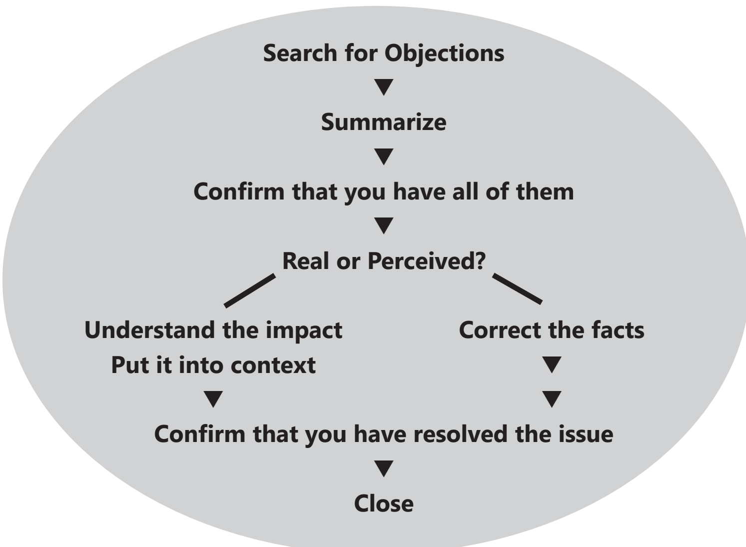
**Handling the Objections**

## *Why should you welcome objections?*

Objections are good. They indicate that the client has a genuine interest in what you are saying. No objections can often indicate a lack of interest. If handled well, objections can be the catalyst for moving forward to mutual commitment.

Objections come in two forms:
- Perceived - View based. Can usually be addressed by clarifying or correcting the facts.
- Real - Fact based. Must be fully understood and handled in the appropriate context.

**Handling Objections**




Use closed questions to flush out objections. For example, "Can we start on the project tomorrow?" If there is an objection the answer will be "No" and a further question can be asked, "What is preventing us from starting?"

Before you can effectively handle a particular objection you need to be sure all associated objections are on the table. If we have identified an objection, then we need to ask the closed 'proceed' question (e.g. "If we address this issue satisfactorily will you be prepared to proceed?"). We need to do this to establish whether or not, there is an associated objection to be solved. This iterative process must continue until all objections have been answered. We have to put our client at ease before we proceed with the proposed course of action.

Remember objections are good. They signify interest and provide you with an opportunity to resolve the issue. This allows you to successfully ask for the opportunity to proceed.

The following table provides further detail on handling objections.

**Conclusion**
The way in which you present the solution will have a major impact on:
- The perceived value of the solution
- The professionalism with which you are viewed
- The likelihood of your recommendations being adopted.

All of the diligent work you have done to get to this point (building engagement, understanding needs, developing a range of solutions) will hold you in good stead. If you fail to present professionally, all that good work may be wasted.

Clearly there can be huge differences in the scale of this exercise; from a simple idea to improve everyday business processes that can be approved over a coffee with the boss, to multi-million dollar projects that will potentially impact every part of the organisation. Clearly the resources required to implement the presentation will be relative to the scale of the solution. Nevertheless, the principles outlined here have relevance to any presentation.

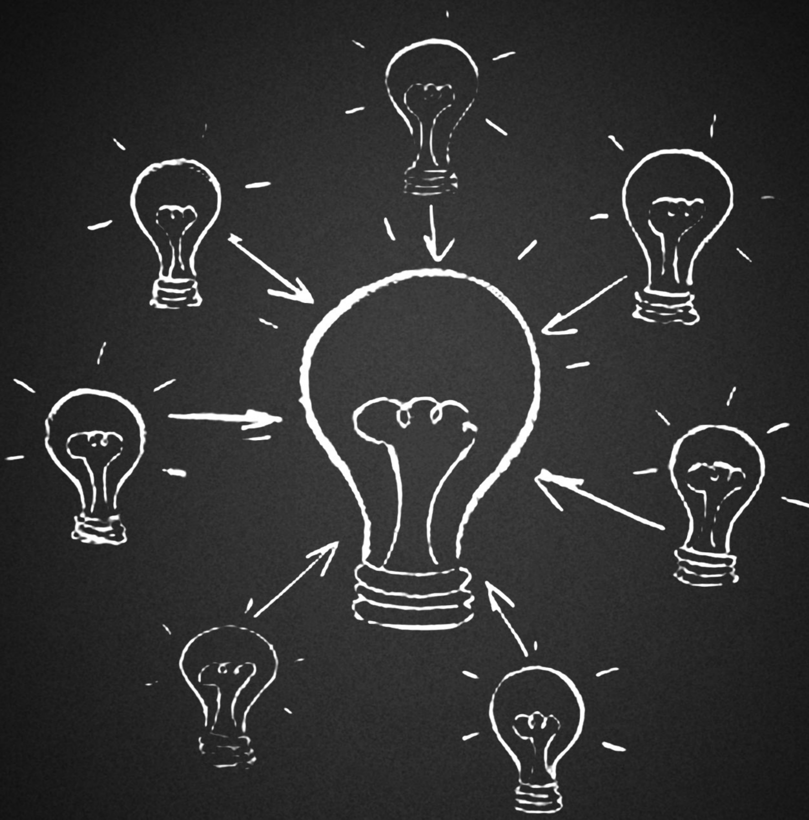
**Template for Handling Objections**

| Step | Action | Example |
|---|---|---|
| 1 | Search for objections | "Are you comfortable with this approach?<br>Do you have any reservations?" |
| 2 | Summarise to ensure there is a clear understanding of the issue | "So am I correct in saying your reservation is a concern about the..." |
| 3 | Ask if there are any other objections | "OK, let's talk about that, but before we do, are there any other related issues that we should consider?" |
| 4 | Is it a real or perceived objection? | Perceived Objection (e.g. "We like your approach but we are concerned that you do not have an Issues Register to manage the complexity of this project")<br>Go to Step 5 or Real Objection (e.g. "The Project Manager you are suggesting looks very proficient, but she has never really worked in a Cards environment before") Go to Step 6 |
| 5 | Handle the Perceived Objection. Clarify the facts | "Sounds like I have failed to show you the details of the Issues Register. It has over 30 users and has been used extensively elsewhere in the Bank. Would you like a demo, or possibly speak to other users?" Go to step 9 |
| 6 | Real Objection. Understand the impact of the problem | "I understand your point. What do you feel would be the major issues that are unique to your Cards environment" |
| 7 | Clarify you understood the impact | "So what you are saying is that she may have difficulties grasping some of the business issues because of her lack experience in the Cards area" |
| 8 | Put it into context | "I understand your point, but she has worked on three other complex projects in the Bank and has always managed the key business issues well. Furthermore, she has implemented a similar solution for a Telco, which was very successful. In the context of her overall experience, do you see the lack of Cards experience as critical?" |
| 9 | Check that you have resolved the objection | "Are you satisfied on this issue now?"<br>Note: This may happen at a separate meeting if you had to take the issue away to get resolution. You may also choose to confirm agreement in writing. Handle any other objections in a similar way. |
| 10 | Close<br>Gain commitment | "Are you prepared to recommend this approach to the steering committee?" REMAIN SILENT and wait for the answer.<br>Note: Closed question to seek commitment. |
| 11 | If the answer is 'No', there are further objections.<br>Go to Step 2 | "What is holding back your support?" |

**Notes:**

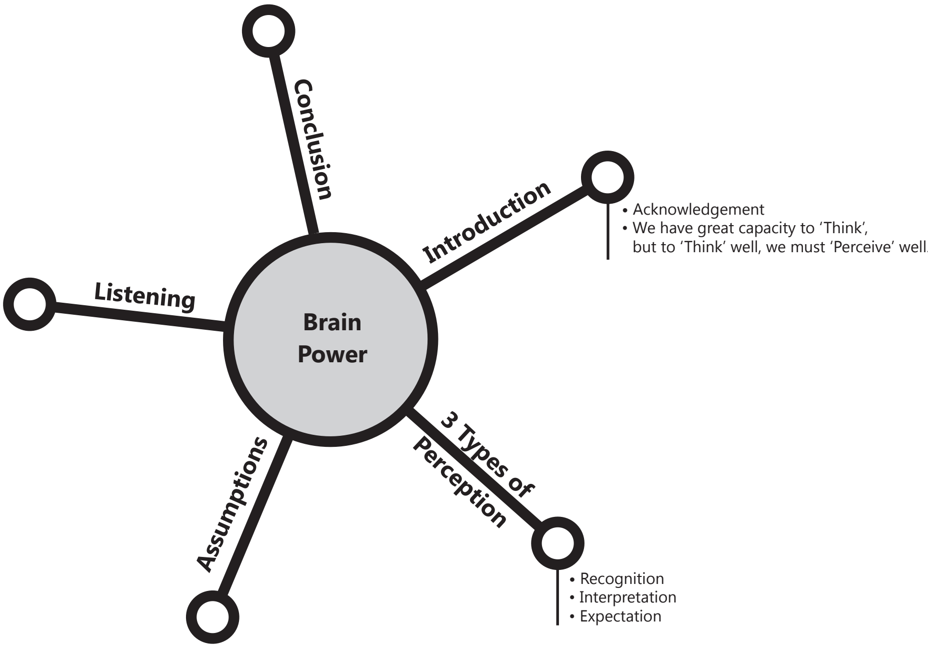
1. A Real Objection is where the client has the correct facts and is uncomfortable with them.
2. A Perceived Objection is where the client has some misinformation that can be corrected.

***All Objections are real to the client; some are just more real than others***



# CHAPTER TWELVE

## Brain Power


Conclusion
Introduction
• Acknowledgement
• We have great capacity to 'Think',
but to 'Think' well, we must 'Perceive' well.
Listening
Brain
Power
3 Types of
Perception
Assumptions
• Recognition
• Interpretation
• Expectation

# Chapter Twelve
## Brain Power: Our capacity to think

**Acknowledgement**
This paper is based largely on the ‘Brain Power’ video, presented by John Houseman, which in turn is based on the thoughts of Dr Karl Albrecht in his book ‘Brain Power’

### *We have a great capacity to think, but...*

In his book ‘Brain Power’ Dr Karl Albrecht claims that we have a great capacity to think, but in practice we often don’t do it very much. Indeed he claims that when assembled together people often tend towards ‘Collective Stupidity’!
To think well requires us to perceive well, so Houseman urges us to understand the process of perception.

**Types of Perception**
There are three types of perception that we all use daily in order to participate constructively in any dialogue. They are:
- Perceptual Recognition
- Perceptual Interpretation
- Perceptual Expectation

Each of these is an automatic response of the brain to assist us in comprehending, and categorising within our base of knowledge and experience, the contents of a new discussion or event. Without these processes, every new discussion would be like starting with an empty brain. For example:

> “Can you pass me the cup?”
> “What’s a cup?”
> “It’s round, with a handle on the side”
> “What’s a handle, what is round?”

It is hard to progress without the ability to relate new perceptions back to our existing database of experience.

**Recognition**
Perceptual Recognition is the way in which we use our base of experience to recognise items and concepts we encounter. For instance when somebody mentions a wheel, we automatically think of a round disc shaped object mounted on some form of hub. However this lacks detail, which may be important. You may be imagining a car wheel complete with tyre, hubcaps etc., whilst I am thinking about a bicycle wheel, also with a tyre but far more slender and with long spokes. The communicator may actually have been intending a water wheel - large, wooden and embedded in a mill.

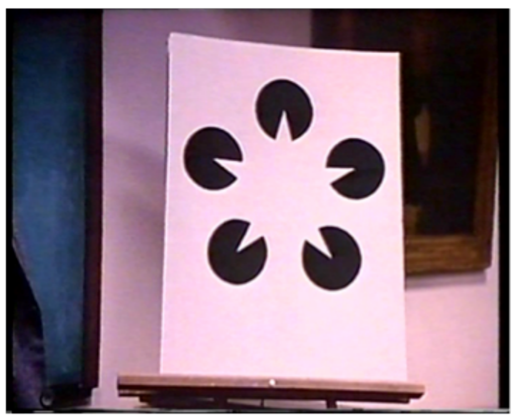
Houseman uses an example of how recognition can be misleading. He invites us to cover our watch with our hand and then describe in detail the face of our watch.

- What colour is it?
- What sort of numerals are on it (Arabic or Roman) and how many?
- What materials and other distinguishing marks does it have?
- If it is digital, what words are written on the face and in what locations?

Most of us find, on looking at our watch, that we have missed or are incorrect about some details. Houseman makes the point that we may have looked at that watch many thousands of times and yet have difficulty in describing it accurately.

Details can be important in our comprehension, but the process of Perceptual Recognition can cause us to miss these details. Even when the communicator goes on to describe some of the detail we may have missed, the brain has a tendency to switch off, confident in the knowledge that we have categorised a perceptual message.

**Interpretation**
When we are presented with a concept or message that is new, we must interpret the perceptual message with something that we already know in order to accelerate comprehension. In our brain's rush to interpret we can easily misinterpret without realising our mistake.
For example Houseman shows us a symbol - a circle with a wedge removed.



He suggests to us that if he puts five of these symbols together he can make us see a star - can you see a star?
Of course you can, but of course you can't because there is no star there! Your brain is simply filling in the gaps to form a complete picture when none actually exists.

Try another one. What does this say?


'Paris in the Spring'? Look again 'Paris in the the Spring'. In interpreting this message our brain can settle on something with which it is familiar, and edit out the second 'the' without us even noticing it. The same phenomenon allows us to read the following passage:

***'The phomnneail pweor of the hmuan mnid'***
*Aoccdrnig to rscheearch at Cmabrigde Uinervtisy, it deosn't mttaer what oredr the ltteers in a wrod are in, the olny iprmoetnt tihng is taht the frist and lsat ltteers be in the rghit pclae. The rset can be a total mses and you can sitll raed it wouthit any porbelm. Tihs is bcuseae the huamn mnid deos not raed ervey lteter by istlef, but the wrod as a wlohe.*

Our ability to interpret in this way is essential to our rapid take up of ideas and concepts, but in so doing, it can lead us to errors of interpretation that could be vitally important.

**Expectation**
Perceptual Expectation is the brain's powerful ability to interpret a perceptual message based on what it is expecting, rather than what is actually contained in the message. Houseman gives the example of an experiment that was conducted by Dr David Rosenhan, a Stanford University Professor. Eight perfectly normal people were instructed to show up at various mental institutions and relate stories about themselves incorporating textbook symptoms in order to get admitted. Once inside, they started to tell the truth. They insisted it was all part of an experiment and that in fact they were perfectly normal. Interestingly no one would listen to them. They were all diagnosed as seriously mal-adjusted ranging from neurotic to schizophrenic. The doctors making these diagnoses were obviously working from very powerful, unconscious expectations.
Expectations like these can produce a closed loop, self-fulfilling, prophesy. You tend to get what you expect to get!

**Assumptions**
From a practical perspective these three types of perception are important to our very existence, but in providing us with an ability to build new knowledge on top of previous experience they can lead us to misleading conclusions that can be dangerous.

The key is to be able to identify when this is happening and take the necessary steps. They are all different forms of assumptions. In our working lives assumptions can be very useful;

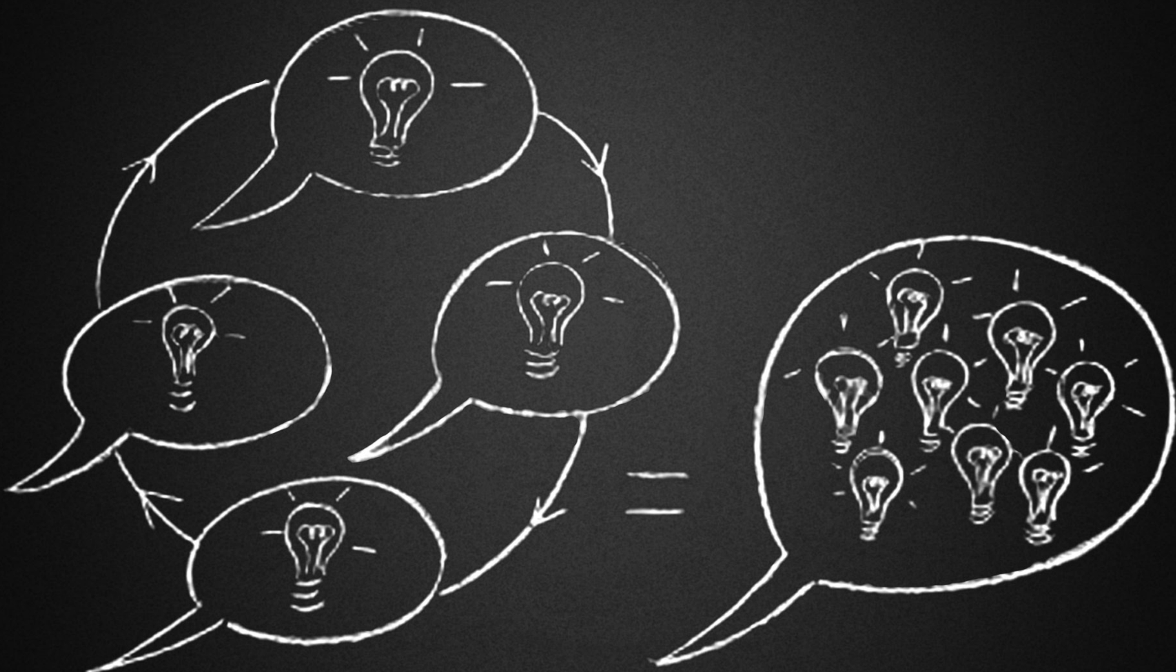
- They help us to form some basis from which to begin when we lack guidelines.
- They help us to put some pegs in the ground in order to define a general approach,
- They help us to make progress based on some reasonable information, which, in the absence of facts, gives us the best possible actions.

In the best projects these assumptions are documented, so that they can be tested later. Some would say that a project cannot be completed until all the assumptions have been proven as facts, or alternatively rejected and replaced with fact.
The problem with the assumptions we make through errors in perception is that we are not aware that they are assumptions. I call then 'auto-assumptions', the assumptions we made believing they were facts. An assumption masquerading as a fact can be very dangerous!

A significant part of our working life requires us to listen and comprehend. These automatic assumptions can be a major barrier to good listening. We need to consciously ask ourselves if we are making any assumptions, and if so how can we validate them. The earlier we are able to identify misinterpretations the less costly they are to correct.

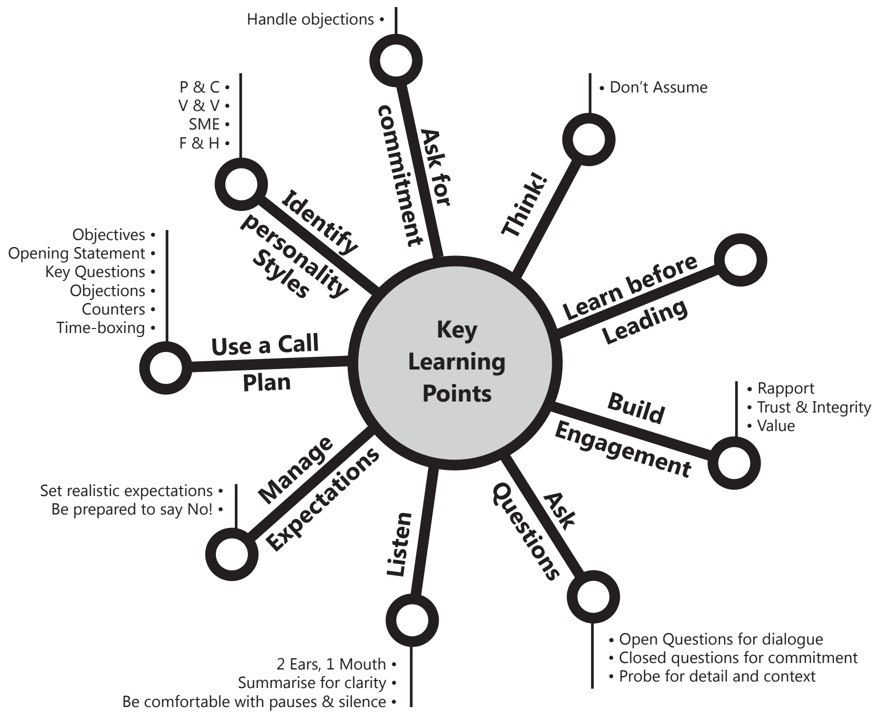
**Conclusion**
Being aware of the dangers inherent in assumptions is the first step to identifying them. We need to consciously activate our radar system to be open minded, challenge and ask questions to ensure that we have understood what was intended.

***We must use our capacity to think!***



# CONCLUSION

*Now Do It*


Key Learning Points
Ask for commitment
Handle objections •
Think!
• Don't Assume
Learn before Leading
Build Engagement
• Rapport
• Trust & Integrity
• Value
Ask Questions
• Open Questions for dialogue
• Closed questions for commitment
• Probe for detail and context
Listen
2 Ears, 1 Mouth •
Summarise for clarity •
Be comfortable with pauses & silence •
Manage Expectations
Set realistic expectations •
Be prepared to say No! •
Use a Call Plan
Objectives •
Opening Statement •
Key Questions •
Objections •
Counters •
Time-boxing •
Identify personality Styles
P & C •
V & V •
SME •
F & H •

# **Conclusion**
# Now do it!

As John Houseman says in the “Brain Power” video:

“You get paid to think! If you’re going to earn your money today, remember that to perceive well is to think well”

I would also add “You also get paid to do! Not just any old way, but to <u>do</u> well – to exceed the expectations of your stakeholders and clients”. You have the skills and tools to do this, as long as you put them into practice consistently. This is not as simple as it sounds. It takes great effort to consciously think through the simple things you need to do well each time, but it does become habit forming.

Good Luck, and remember the harder you work (at doing the right things) the luckier you will get!

# About JHW Engagement Skills Workshop

As service providers we all have stakeholders (or clients) to serve. Based on their perceptions we either excel or fail in our endeavours – they are our judge and jury. At JHW we believe that there are three main aspects of what we do that impact on our stakeholder's or client's perception of our performance. These are our expertise, our processes and methodologies, and how well we engage with our clients. All of these are essential for a successful outcome.

We regularly see customers being 'under-whelmed' with the service they receive. Sustainable success requires good engagement. We find that many professionals who excel with their expertise and processes, fail to earn the rewards they deserve because they do not develop the appropriate level of engagement with their clients.

The JHW Engagement Skills Workshop is designed to enable professional and technical specialists to deploy their knowledge in a more productive form. It helps participants to think consciously about things such as –

- the essentials of true engagement
- managing expectations
- when and where to use influence or authority
- how to find time to be proactive.

The workshop is about attitude, skills development and behavioural change.

JHW comprises a group of experienced consultants who facilitate the learning experience and behavioural change with the participants on the program.

**For further information contact:**
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email john.willliams@jhw.com.au
or visit www.jhw.com.au

# Notes

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RRP $49.00