

Modes of Consultancy

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When you start working as a consultant, you have to switch into a completely different role. You are no longer an employee, keeping the firm going and getting things done. The role you adopt depends on your professional skills and the type of consultancy you do.

One role is the ‘medical mode’. The family doctor listens to the patient’s complaints, looks for symptoms, makes investigations, analyses the information, makes a diagnosis and then writes a prescription. It is up to the patients to act on this advice if they want to. The patients do not pretend to understand medicine, so they have to trust the doctor. Their trust is greater if the doctor can explain what is wrong in simple terms.

I am an economist and I work in this mode. My job is to provide hard economic analysis of the situation and to find out what is really the problem. I then come up with a diagnosis and recommendations. I use theory which my clients do not understand to reach the diagnosis - though I explain it to them in plain English.

I come up with a prescription, with recommendations. I say what must be done, but I do not tell clients how to do it, or how to run their firms.

This is quite different from the work of a consultant who works in the ‘facilitator mode’. As a facilitator, you start with the belief that the clients’ organization has all the skills and knowledge needed to solve the problem. It is not managing to do this because

of office politics, or because the staff see themselves as people who get things done, rather than as problem solvers.

You help your clients define their problem, and you help them solve the problem. This may mean guiding discussions, or it may mean training them in problem solving techniques. You show them how to work together.

At the end, the clients have solved their problem, and the people on the team are committed to implementing it. They have a new skill, and will be able to solve problems themselves in future.

This can go disastrously wrong. You do a wonderful job, get the problem solved, and leave the team implementing the solution. However, the client expected you to be working in the medical mode, with you doing all the work and presenting a fat report at the end. They perceive that you have been hanging round the office, that you have taken up a lot of management time, that you did not even produce a report and that, as a result, they had to do the job themselves. The client is furious, and refuses to pay you.

This is quite unfair, of course, but it happens. The reason is that you and your clients started off, and certainly ended, with completely different perceptions of your role.

I sometimes get something similar. Some clients think that economic analysis should be done as a group endeavour, with everybody in the client organization - administrators, engineers, technicians - having an equal, democratic, input. The fact that my reports set out the logic in clear plain English encourages their belief that economics is just common sense. How can I meet this objection? I cannot do hard economic analysis as part of a group like this, but I can, and I do, speak to as many people as possible in the organization. I listen with attention and respect, because their opinions and experience are valuable input, but I do not let them do the economics.

I am also aware that the results of my work are based on hard fact and theory. This is sometimes seen as a non-consultative take-it-or-leave-it attitude, with conclusions that are too hard and which do not agree with the views of some of the management. Again, it is a matter of negotiating with the client whether they want expert advice of this sort.

I do envy engineers though - presumably they do not get accountants, marketing people and so on telling them how to design their bridges.

An extreme form of the medical mode, one which I do not work in, is the brain surgeon mode. Here the patient is made unconscious and the surgeon makes major

changes which the patient cannot understand, cannot give informed consent to, and cannot implement. This is done only in emergencies, by receivers, for instance.

The big rule for avoiding conflict and getting paid is to negotiate your role at the beginning, and to keep reminding the client of what you are doing throughout the contract.

You have little chance of success if your proposal is to do one type of consultancy, while your prospective clients are looking for another. Find out what they really want before you start to write. Similarly, major conflicts can arise when the client thinks you are doing one form of consultancy and you think you are doing another.

WHICH MODE DO YOU OPERATE IN?

Which of the following are you?

1. **Facilitator:** The client knows that there is the in-house capacity to solve the problem. The client may even know what the desired solution is. The job of the facilitator is to see that they do it. This may be by providing independent chairing etc to remove some of the micro politics.
2. **Change Agent**
3. **Coping skills:** The client wants to acquire new coping skills, such as management techniques, TQM. Training and education.
4. **Someone to do the job** With downsizing, delayering etc firms are stretched to the limit. There is a need for temps to take over sales manager, etc when someone is on leave, etc.
5. **The carpenter:** The client knows what has to be done but has not the time or the specialist skills to do the job. A carpenter is needed to fix the furniture or a computer expert is needed to install computers, or to run training courses that the existing staff think they could do equally well if they had the time. The client may or may not have respect for the specialist skills employed. A keen DIY enthusiast may feel that he or she could do the job better than the carpenter could,

but recognize that it is cheaper to employ the carpenter. The client is not employing a diagnostician.

6. **Medical model:** The consultant adopts the same approach as a doctor: he or she looks at the patient, diagnoses the problem and writes a prescription. This is often the approach of an economist, an agricultural adviser or some management consultants. It is infuriating to the clients who knew what they wanted to do but wanted a change agent or facilitator to get them there, or who just wanted a temp, or a carpenter to do a job.
7. **Honest Outsider:** Auditor or non-executive director.
8. **Scapegoat:** Someone wants to make big changes and wants you to carry the can. You will not be popular at the end, to the extent that you may have to fight for your fee.
9. **Brain Surgeon:** The client has total trust in you and will go out under the anaesthetic while you operate.
10. **Psychologist:** You help clients to dissect, understand and diagnose their problems, and to agree on how they can treat themselves.
11. **Nurse:** Your job is to give clients confidence, to hold their hands during the painful process of treatment.
12. **Chemist:** The clients say what is wrong with them, and you provide standard, off-the-shelf remedies. You may put these in new bottles to give them extra confidence.

Medical Mode

Diagnosis of the problem through analysis of data.

Problem solving through data gathering, analysis of data, conclusions and recommendations. The process may be iterative, in an action cycle.

The consultant gives a conclusion: this is what I think is the problem.

Given the conclusions above, you can achieve your stated objectives by doing X, Y and Z.

I am the expert. I am here for a short time to do a specific job, to diagnose your problems and make recommendations. When I am finished, I leave.

I do the analysis, working on information provided by your organization.

The system must implement the recommendations. If necessary, the system must change.

Process Mode

Clarification of the organization's or the individual's perceptions of the problem. This may involve making politics, micro-politics and emotions explicit.

Teaching or facilitating problem solving by the organization.

These are the facts, opinions and objectives within your organization. What do you think? What are your conclusions?

I am going to show you how you can develop a programme of action derived from your conclusions.

We work together as part of a single team, with close relationships. My expertise is the process, not the solution. We will have long-term contact.

I work on the people and the relationships. The client's staff do the analysis.

The system is the problem.

You are very different from someone who has gone straight into management consultancy from university. You have valuable experience and skills. Some of the skills that will help you are:

Seeing the reality behind the figures, behind the plush offices, behind the glossy papers.

Being able to identify the office politics, but to remain an independent outsider.

Collection of data. You are an outsider to your client's organization, so you have to overcome resistance and secrecy within the organization. You are a competitor to their competitors, so you do may have difficulty in getting industry level data.

Interviewing. This is your main source of information on the politics and micro-politics. It is also the main source of the information for analysis. The figures are used for quantifying this, not as a substitute. You are seen as dangerous and even hostile by the people you interview, but you must still get the information, or you fail as a consultant.

Analysis of the problem. Ability to apply a high level of analysis to real-life problems. This may require a very different approach to academic theory and research. It certainly requires more than some hands on experience in the past.

Getting to the key issues. The clients think that they are paying you a lot. They want results very much faster than they would get them from their own staff. You cannot afford to waste time on trivia. You cannot even waste time on things that are important but not within your terms of reference.

Working without data, and working with data you know to be inaccurate. This is the real world. You know there are problems, but you must do rigorous analysis, and produce recommendations and conclusions that people's jobs depend on.

Not being situation dependent. You may have practiced your theory on one specific industry, and gained your experience there. You have to be able to apply it to a wide of different situations and industries. You also have to know what you cannot apply.

Knowing your limitations and the limitations of your analysis. The pressure to produce, the knowledge that the data are wrong or not available, and time pressures mean that you are under pressure to give firm conclusions not justified by your analysis. You may also give too much weight to experience which only applies to one specific instance.

Originality. Sometimes, not always, originality is wanted. You are employed partly because you are an outsider and are not tied by the habits of people who have worked in the firm for twenty years. You are certainly expected to bring in your experience from elsewhere. You are certainly expected to decide which of the constraints the clients think they face are real constraints. You are certainly expected to re-examine objectives and strategies for achieving them.

Ability to keep your clients along with you as you progress.

Management of change. This is not part of all consultancy. For those consultants that use it, it is a professional skill rather than a consultancy skill.

Ability to diagnose problems.

Ability to identify practical implementable solutions

not 'academic', 'theoretical', unimplementable solutions. To give credibility to your conclusions, it is useful if you can say 'I have seen it done elsewhere' or 'Some firms tackle it in a different way'. It is also useful to say, 'There are dangers, I have seen it fail because . . .'

Report writing: inception reports, progress reports, midterm reports, draft final report, final report. In many types of consultancy this is your only output. The report must be accepted, it must be paid for, and it must get action. In other types of consultancy where the report is a relatively minor output, it is still often the most visible, most tangible output. You will be judged on it even when your other outputs are forgotten.

Time management.

You are likely to be paid by the day, for a fixed period. If you do not deliver within that period, then, at best, you will be working for free. You may face penalty clauses. You will certainly annoy your client, and reduce the chance of follow-up jobs.

Team leadership