

'Flawless' Consulting for AtlasX Staff Interacting with SSC

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AtlasX Flawless Consulting at SSC



Topics for last month's workshop:

- **Consulting Challenge – Desired Outcomes**
 - Goals and Roles
 - Results vs Growth
 - The Consulting Grid

Topic for this month's workshop:

- **Flawless Consulting Overview**
- **Consulting Phases – Overview**



AtlasX Flawless Consulting at SSC

Part 1: Team views of a Consultant

What is a consultant

Find a picture of a consult and, drop it on Mural with a descriptive sticky
(Anti-pattern / non-examples are ok too...)



What do all these consultant persona have in common?

- Trying to improve the work (results) or the skills (growth) of their clients
- Doing that while interacting (virtually or in person) with various staff in the client organization

Reminder: Consulting Goals and Roles



In any consultation, the client will have two types of needs:

The need for results

Refers to concrete outcomes associated with the project. These might include changes to the bottom line, skills learned, or changes in behavior and attitudes.

The need for growth

This means increased capacity to perform new functions or behaviors on a continuing basis.

If a high level of growth is achieved in the consultation, then the client will be able to do the job next time with less or no outside help.

Reminder: Scope of Results Vs. Growth



The need for results and the need for growth will vary depending on the nature of the consulting project.

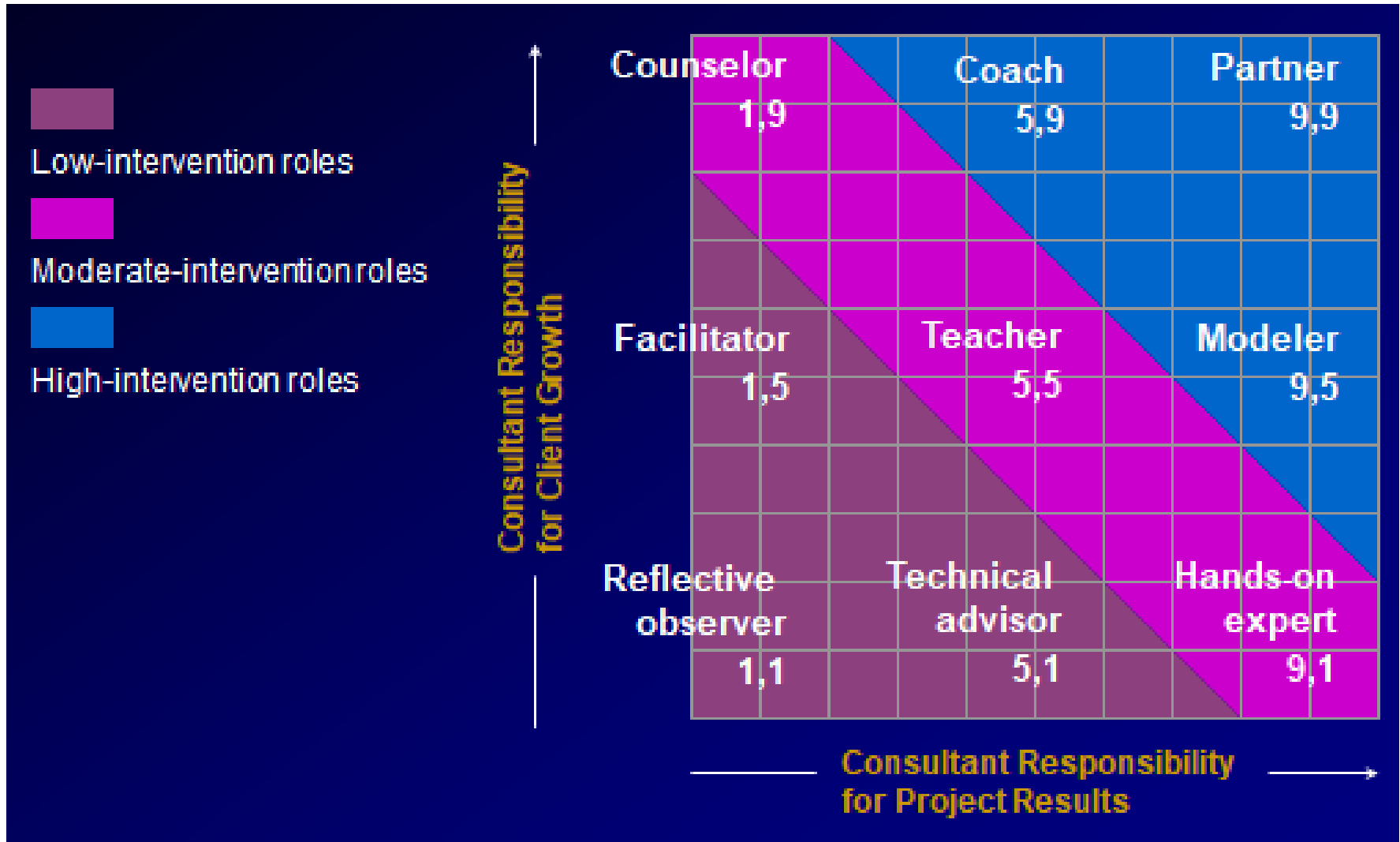
Results: Catching the fish for the client

In performing a one-time service with which the client is unfamiliar, the consultant's major focus is likely to be "getting the job done" for the client.

Growth: Teaching the client to fish

In helping the client perform an important and recurring—but new—task, the appropriate emphasis is on helping the client learn how to perform that task over the long haul instead of merely producing an immediate result.

Reminder: The Consulting Role Grid





Reminder: Typical Role Statements for the Consulting Role Grid

Counselor "You do it; I will be your soundingboard."	Coach "You did well; you can add this next time."	Partner "We will do it together and learn from each other."
Facilitator "You do it; I will attend to the process."	Teacher "Here are some principles you can use to solve problems of this type."	Modeler "I will do it; you watch so you can learn from me."
Reflective observer "You do it; I will watch and tell you what I see and hear."	Technical advisor "I will answer your questions as you go along."	Hands-on expert "I will do it for you; I will tell you what to do."

Exercise: Put a star where you feel most comfortable! And an "X" for Least...

What to Take into Today's Discussion



Interacting to support achieving Results vs Growth may have different expressions throughout a consulting life cycle

- Being able to explicitly identify the goal of the interaction and your role in it will help you to decide how to best interact to meet the goals of your particular engagement
- Sometimes you may be able to short cut certain aspects of the consulting life cycle
 - Understanding the consulting life cycle and the intent of the phases makes that an **explicit** decision that you can evaluate vs an implicit decision that often leads to surprises

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Successful Delivery

Exercise: Good Consulting Gone Bad

When you have trouble meeting results or growth goals, which of the following do you think have contributed?

Put a check next to the one (or ones) you've seen

- **Entry and Contracting**
- **Discovery & Dialogue**
- **Analysis and the Decision to Act**
- **Engagement & Implementation**
- **Extension, Recycle, or Termination**



*5 Phases of Consulting

<https://infolific.com/technology/it-consulting/5-phases-of-consulting/>

Phases of Flawless Consulting – Overview*



- **Entry and Contracting**
- **Discovery & Dialogue**
- **Analysis & the Decision to Act**
- **Engagement & Implementation**
- **Extension, Recycle, or Termination**



*Plan – Do – Check
– Adjust (PDCA)
cycle is inherent in
all of our work*

It isn't just about activities – there are tenets inherent to this approach to consulting that underpin the life cycle

**Consulting
too!**

*5 Phases of Consulting
<https://infolific.com/technology/it-consulting/5-phases-of-consulting/>

Tenets of Flawless Consulting



Establish a collaborative relationship with the client

Solve problems so they stay solved

Attend to both technical/business problem and the relationship

Be explicit about the roles you and the client will play

Be accountable for the agreed-to outcomes

....and, be **AUTHENTIC!**

“This means putting into words what you are experiencing with the client as you work.” (p. 37)

Entry and Contracting



This first phase deals with the initial contact with the client about the project. For our work, you're meeting directly with our customer(s).

Tasks to meet Contracting requirements include:

- Setting up the first meeting.
- Exploring what the problem is (and isn't).
- Determining if you're right for the work.
- Listing the client's expectations.
- Specifying what expectations you have.
- Agreeing on the alignment of client and consultant expectations
- Figuring out how to get started.

When consultants talk about their disasters, their conclusion is usually that the project was faulty in the initial contracting stage.

What are specific enablers & challenges related to this phase in our SSC work?



Discovery & Dialogue

It's important that consultants come up with their sense of the problem. Some consider this step to be where the consultant adds the most value. Out of this phase the consultant needs to know who is going to be involved in defining the problem:

- What methods will be used
- What kind of data should be collected
- How long will it take

What are specific enablers & challenges related to this phase in our SSC work?

Analysis and the Decision to Act



As a consultant you'll need to report your findings from phase 2. The key here is to take the mountain of information that has been collected and reduce it so that it can be managed and understood.

A consultant must decide how to involve the client in the process of analyzing the information.

Be prepared to encounter resistance when giving feedback to the organization. The more high-profile the project, the more resistance you are likely to encounter. The consultant must handle this resistance before an appropriate decision can be made about how to proceed.

This phases is pretty much what others call the planning phase and includes:

- Setting the goals for the project
- Selecting the best action steps

What are specific enablers & challenges related to this phase in our SSC work?



Engagement & Implementation

As the name implies, this step involves taking everything that has been decided previously and implementing the solution decided upon.

Often, the implementation falls to the organization, but in our environment this is typically a collaboration with our customer.

Some projects start implementation or technology transition with an educational event.

This should be a series of meetings to introduce some change. It may require a single meeting to get different parts of the organization together to address a problem.

Remember a critical success factor is leadership buy in and top cover.

What are specific enablers & challenges related to this phase in our SSC work?

Extension, Recycle, or Termination



This begins with an evaluation of the main event.

Following this is the decision whether to extend the process to a larger segment of the organization.

Sometimes it is not until after some implementation occurs that a clear picture of the real problem emerges. In this case the process recycles and a new work plan needs to be discussed.

If the implementation was either a huge success or a moderate-to-high failure, termination of further involvement on this project may be in the offing.

There are many options for ending the relationship and termination should be considered a legitimate and important part of the consultation. If done well, it can provide an important learning experience for the client and the consultant, and also keep the door open for future work with the organization.

What are specific enablers & challenges related to this phase in our SSC work?



Deeper Dive: Entry and Contracting

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Entry and Contracting: Requirements to be Met



What is a contract?

- An explicit agreement of what the consultant and client expect from each other and how they are going to work together
 - More common to be written when external consultants are involved
 - Essentially a social contract, establishing clear expectations about what is going to happen on a project
- Explicit doesn't necessarily mean a “legally binding” instrument
 - Charters are a common way of contracting in some settings
 - MOAs/MOUs are common in other settings

Fundamentals of a valid, useful contract:

- Both sides enter the agreement freely and by their own choosing
- Valid consideration must be given both parties for a solid contract to exist

Before Contracting, Environmental Sensing is Needed



“Context is everything”—SuZ Miller (and many others, I’m sure!)

Even before identifying the problem, identifying the cultural, economic, technology, and other relevant aspects of the environment that constrain either the problem or solution need to be recognized, even if not deeply understood

Example:

- Organization comes to you asking for “innovation training”. Elements of the context that affect how you might help include:
 - Why is training the focus of the ask?
 - What is the context of “innovation” in this organization? research? Early prototype products? Practices?
 - Are innovation practices already being used in the organization? (eg is this refresher training or initial start of adoption?) If so, which ones?
 - How big is the organization/training target population?
 - others you would ask?

[Context is Everything, Edited, compiled, and reissued. | by Derrick Jones | Words, Ideas, Thoughts | Medium](#)



Typical Needs of a Consultant Entering into a Contract

Operational partnership in the venture

- Having influence, being communicated with, being respected for your unique contribution

Access to people and information in the relevant parts of the organization

- Freedom of movement to pursue relevant issues and data

Time of the people in the relevant parts of the organization

- The hardest thing to get from the organization wanting to improve
- If leadership doesn't want you to "interrupt" their staff, that's a warning signal

Opportunity to be innovative

- The reason many consultants are in this arena!

Some of these can be specified in the contract explicitly (e.g. how much time people in the organization will contribute to the engagement), other needs have to be nurtured as part of building the relationship



Selected Competencies needed for Contracting (not exhaustive)

Ability to negotiate wants

Cope with mixed motivations

Surface concerns about exposure and loss of control

Being able to articulate the consultant's desired role (i.e. via Consulting Grid) and negotiate agreement from client on the appropriate role for this engagement

Understand triangular (you, the client, the client's boss) and rectangular (you, your boss, the client, the client's boss) contracts

Typical Elements of the Consulting Contract



Boundaries of the Analysis/Engagement

Objectives of the Project/Engagement

The Kind of Information You Seek

Your Role in the Project

The Product You will Deliver

What Support and Involvement You Need from the Client

Time Schedule

Confidentiality

Feedback to You Later (after project is completed)

If there was one element from the above list you could add to your typical contracting instrument, what would it be? (use Zoom annotation to mark to the left)

Techniques to Consider When Contracting



Client/Consultant Wants and Offers

- TONS of information comes from this activity
 - Understanding of crispness of client wants/need for further elaboration
 - Understanding of alignment/misalignment between consultant and client in terms of many different elements of the contract
- May need a couple rounds of this to get to closure on what's feasible

Force Field Diagram

- What forces are making the problem worse, and which are making it better?
 - Lots of information about the organizational context comes from this

Summary

All phases of the consulting process have particular challenges and techniques for navigating

Entry and Contracting is one of the common phases where lack of resolution of issues identified results in problems throughout the engagement

This was just the tip of the iceberg on building effective consulting skills

