



Thread Advisory



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My Consulting Playbook – Part 2.

In Chapter 1 of this mini-series, I reflected on the lessons I have learned over the past nine years as a strategic advisor and consultant, working with clients across Malaysia and internationally. The focus of that chapter was the first stage of the consulting process — **Diagnostic**. In this chapter, I turn my attention to the second stage — **Design** — where insights are transformed into solutions and ideas are translated into actionable plans that create tangible and meaningful impact for clients.

Diagnostic

Design

Deployment

The Design Stage

Give centre-stage to the problem and the project scope.

The diagnostic stage would have provided a wealth of information, some of it relevant, some of it not directly or indirectly relevant to the project scope. At the diagnostic stage, I would have listened intently to everything that was being said. That does not mean however that I will take action or address every issue / problem / situation that was raised during the information gathering efforts.

At the design stage, I will need to be laser-focused on ensuring the **recommendations solve the identified problem(s) the project intends to address**. This seems to be common sense. But believe me, it is not always so simple or straight forward, as many inter-dependencies may emerge or may need to be addressed. There may be different stakeholders who may put pressure on you to address complementary areas that may not have been originally considered or included in the scope of the project.

And it is here when you need to ensure you focus everyone's attention around the problem that needs to be addressed and the assumptions that were taken at the initial stages of the project. If this is not done adequately, you may find yourself having what is call "**scope creep**", and that will have a significant impact on your ability to deliver what you committed to, and may dilute the impact of your suggested solution.

When at the design stage, the mindset must be to solve the relevant problems, not to secure future additional pieces of work for yourself. I am convinced that if I deliver the agreed solution, in most cases the client will seek my help to address the complementary issues. In many cases I volunteer during informal discussions and at no additional fees, possible alternative solutions to the complementary issues. I want the client to understand that I know what needs to be done, but I will not engage in addressing those issues at the moment, as I have been contracted to address other issues and to put in place the fundamentals that will enable them to follow through with other solutions to other existing issues.

As consultants we need to be comfortable with knowing that our advice / proposed solutions are not design to solve every existing problem. They are designed to improve the way things are done, or the negative impact of not doing things in particular ways. But as with any organization, things are fluid, one solution may improve the situation but may not be the only thing that needs to be addressed. That is why a disciplined design approach will be essential towards putting in place the relevant components of the solution that will in the long run have a positive impact on specific organizational practices / systems.



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Co-creation instead of self-creation.

Even when I may have previous experience on the topic at hand, or on the issue being addressed, or in using the framework being introduced, I will never know the intricacies of how the organization operates, what makes it tick, what will work best, what will be a waste of time. I remind myself that my ego and self-believe should never drive the development of the right solution. I need to ensure **I involve the right stakeholders** from the organization to participate in the design of the solution. Many first-time consultants always struggle with this concept. They fear that by doing this they may lose credibility in the eyes of the client. They think that the client has engaged them for their expertise, so why should they involve the organizational team members in putting together the solution. And yes, I had this mindset too! But soon enough I realized that my expertise and knowledge will never be enough to design a solution that is fully customized and relevant to the client if I don't involve them in the crafting of the solution. And there are a few ways in which you can involve the client team members, namely:

- a. Consultant designs the first draft from scratch and then facilitates sessions to get the client to fill up the details.
- b. Consultant brings the client team members together to brainstorm possible alternatives, then the consultant develops the solution based on the inputs received.
- c. Consultant uses the current system / process / practice, identifies possible improvements and then brings the clients to discuss the suitability of the proposed changes so that the relevant ones are selected and acted on.

The possibility of having complains by some of the client representatives about their involvement in designing the solution is very real. And as a consultant I don't take offense if they question my ability when I involve them in the process. I will gladly engage with them to highlight how their involvement will ensure that the ultimate solution is **fully customized and suitable for their environment**. I attempt to make them see how a solution designed independently by myself may not adequately address the issues and will most likely generate more damage than positive results. I also attempt to get them to realize that by getting them involved in the process I am **building ownership on the solution** from the early stages of the project, thus enabling a smoother implementation of the agreed changes.

Perfection is the enemy of deployment

When co-designing a solution to a problem, I need to consider the organizational realities, maturity and resources available, to ensure the framework and infrastructure designed can be successfully deployed. I don't want to end up with a **perfect design that can not be operationalized**. That is a sure recipe for disaster. No value added. No tangible impact. No change achieved.

At the beginning of my consulting days, I used to be frustrated if a client told me to "hold my horses". I used to get very excited with possibilities, with frameworks and infrastructure I had seen worked in other organizations, and I felt were perfect to address the client's needs. And in some cases, my excitement will be met with a dose of realism and the realization that the perfect model / framework will not work in the current client's environment. When I understood that what mattered more than the perfection of the framework / infrastructure, was how practical and relatable it was, I then was able to move forward to design customized solutions that will address a problem at a particular point in time. I understood that the ideal model / infrastructure may actually pull the client backwards, or may not address the problem, thus creating more



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confusion or preventing the identification of a viable solution. It was at this point, when I realized that the design stage needed to be considered from an **implementation perspective**, instead than from a perfection point of view. Even a solution may be temporary or may partially address the issue. But if crafted adequately, it will set the client in the right path towards **deploying a short-term or partial remedy that will ultimately address the problem in the long term.**

The design stage is where the value of the diagnostic effort is ultimately realized. It is when information is translated into solutions, ideas are converted into action plans, aspirations are transformed into practical frameworks that can create meaningful impact. Over the years, I have learned that successful design is not about creating the most sophisticated solution, but about maintaining a disciplined focus on the problem being solved, involving the right stakeholders in developing the solution, and ensuring that what is designed can actually be implemented. When these three principles come together, the result is not just a well-designed framework, but a solution that the organization can own, deploy, and build upon. In the next chapter, I will explore the third and final stage of the consulting journey — Deployment — where even the best-designed solutions are ultimately tested by the organizational realities.

If you or your organization is seeking to undertake a strategic or operational human capital management project, please reach out (claudia@thread-advisory.com) or visit our website (www.thread-advisory.com) to review the type of projects we have performed for our clients.