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My Consulting Playbook – Part 3

In Chapters 1 and 2 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 these chapters was on the first and second stages of the consulting process — **Diagnostic and Design**. In chapter 3, I turn my attention to the third and last stage — **Deployment** — where crafted solutions are implemented and the intended tangible and meaningful impact for clients is realized and measured.

The Deployment Stage

"Why" takes centre stage

An inexperienced consultant may think it is not necessary to explain the reasons behind the introduced changes. After all, the client has agreed to them and the consultant has already designed the most suitable approach. Yes, that is all correct. However, the successful deployment of any project largely depends on the employees' ability to understand the reason behind the change, and what may happen if the changes are not introduced. It is therefore important to ensure the reasons behind the change are clearly presented, discussed and communicated during the project's deployment stage.

Most experienced consultants will be familiar with the term "**the burning platform**", a concept derived from the story of a worker trapped on a burning oil platform in the North Sea in 1988. Faced with a life-threatening situation, he had to make a very difficult decision: remain on the platform and face almost certain death, or jump into the freezing waters below and take a chance at surviving the ordeal. For organizations, the burning platform represents the compelling reason for change. I believe as part of the deployment steps, the consultant must support the organization to clearly articulate why maintaining the status quo is no longer a viable option and why change must take place. Without the burning platform, employees may understand what is changing but may not be able to appreciate why the change is necessary. And this may result in employees clinging to the practices the project intends to change / enhance, resist the new ways of working being introduced, or just wait for the initiative to "die of natural death".

With diverse projects, stakeholders and business contexts to deal with, I was quick to understand that building not just the awareness, but more importantly the understanding of the reasons behind the introduced changes was at the heart of a successful deployment project stage.

Transfer of knowledge and letting go – I don't want to be a "security blanket"

When you are building a consulting business, specially when you are not backed by a known corporate name, it may be tempting to try and hold on to the clients you acquire by not building internal capability around what is being designed and deployed. You may think that making yourself "indispensable" may secure a lasting consulting relationship with the client. I could not disagree more with this philosophy. I subscribe to the total opposite view point. The more you share, the more you teach, the more you coach and nurture, the more likelihood of you securing further work with the same client. And if it does not happen, the least you get is a great relationship and network with new people, that later on may go to work for other organizations that may need support from a HR perspective. And guess who they will look for and think about? The consultant that supported them, and taught them a bit of what they know today.

I learnt about the importance of **knowledge transfer** the hard way…during my first consulting stint, over 15 years ago, working for a reputable international consulting HR firm while being the Project Manager for a mayor client in Malaysia. The team and I worked really hard to ensure we delivered good quality work. We did most of the work ourselves with minor involvement from the client. When we concluded the assignment, and the time came for the client to take over from where we left, I learnt a few months later that many of the HR team members blamed us for their inability to execute some of the recommendations. I was mortified to say the least, because in my heart I thought we had done the best we could to put them in the right position to succeed. At this stage, I took the decision to leave consulting and for a variety of reasons I ended up working for the same client and deploying many of the recommendations I and the team had worked on during the previous months. It was when I was on the client side, that I realized what we had failed to do. We had **not transferred our knowledge successfully** to those who were responsible for carrying on.

I ensured that 15 years later when I became a consultant again, I did not repeat the same mistake. In fact, I not only involve the HR team members, and any other relevant organizational team member in the deployment stage of the project. I make it a point to involve them even during the diagnostic stage. I ensure they learn how to diagnose a problem, how they should be inquisitive and curious in order to better understand the circumstances. I "push" the team members to work alongside me and ask questions, give ideas, build the frameworks and make mistakes along the way, so they understand that failing is part of learning and adding value. As a consultant I don't need to show I am perfect and I know it all. I believe I need to show the team that together we can come up with something more powerful, more relevant and more applicable to the organization's circumstances. I want to build ownership and pride in what is being crafted and deployed.

As the deployment stage progresses, I slowly retrieve, allowing the client to take the driving seat, while I place myself as a co-pilot. I will slowly fade into the background, allowing the client team members to shine, become more confident and inject their own style as they deploy the recommendations. I support, provide feedback, interject when needed, but mostly keep a low profile. Sometimes the client tries to push me to the front, and I will always say to them: "Don't treat me like your security blanket, because that will set you back". I will support the client around how to deal with the challenges independently, and eventually, they will realize, they are shining on their own. They no longer need me. And that makes me happy! I can then move to discuss other pieces of work either with them or with some other prospects, knowing that in months or years to come, I will not hear again, as I did 15 years ago, that the client is "blaming" me for their inability to get the desired results / impact with the deployed changes.

The inter-dependencies that are not addressed – a future business opportunity?

As we deployed the approved recommendations, it may become evident that certain areas of work will not be addressed / covered with the approved recommendations. This is a hard fact and reality that must be dealt with openly and transparently. It is at this stage when many stakeholders may bring this matter again, as a follow up from what they shared with you during the diagnostic stage. And it is at this moment when you need to determine what is the best way to address this situation to secure a win-win for you as a consultant and for the client.

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As an inexperienced consultant, I many times ended up “patching” my work, so that I could demonstrate I was addressing multiple inter-dependencies which emerged along the way. However, this generally made me feel bitter about the fact I was spending countless non-chargeable hours doing work which wasn’t contracted simply to avoid the “noise” and the complains from some stakeholders. But, at the end of the day, in consideration that the design stage may not have taken into account the “out-of-scope” inter-dependencies, there was little I could do to address them at such late stage in the project, and in many cases, this created further dissatisfaction from the stakeholders, instead of truly addressing the complementary issues at hand.

As I grew in confidence, and reflected on the situation, I realized that what was important was to be clear around the **“in-scope” / “out-of-scope”** dimensions. That allowed me to communicate in an objective manner the reasons behind the way in which the recommendations where being deployed and the areas it intended to address. It allowed me to clearly communicate to the stakeholders what was needed in order to address the “out-of-scope” inter-dependencies. Either through a separate project, or through the internal resources which were better prepared to think through the issues and address them internally without my direct involvement. And the reactions from the stakeholders fundamentally changed. I no longer felt unhappy, and the stakeholders did not come back asking for more. We created a common understanding and respect for what could be expected as desired outcomes, and what needed to be managed independently.

It is not in my nature to push for additional work. Many business development professionals may frown at my admission. In my heart and through my experience, I know that when the client sees the value of the work you produce, this will become the best business development tool for you as a consultant. Let the work speak for itself. Don’t try to push too hard. As a costumer, we all know what is value for money. Let it simmer. Let the client reflect, consider alternatives and decide. It may take a few months, a few years. It may never come. For me, I put forward my best work, and I allow that to be the reason why a client will come back to me asking for more. And in my experience, I can say that over 60% of the work I do has been from “repeat-customers”.

In short, and through the implementation of many deployment stages, I learnt that the success of my consulting assignments will not be determined by the quality of the diagnosis or the elegance of the design. Success will ultimately be measured by the extent to which the employees will understand the reasons for the introduced change, when they embrace ownership of the solution, and when they develop the capability to sustain it long after I am gone. I came to realize that my role is not to be the heroine of the story, nor the custodian of the solution, but the person that enables others to succeed. When the client no longer needs me to maintain momentum and can confidently take ownership of the changes, and when the value of the work speaks for itself, I know the deployment stage has achieved its true purpose, and I know that I as a consultant have done my job! It is at this moment when I can safely and confidently say: my 3D playbook is working.

And now, after completing the 3 articles…back to work!

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.