Phases in Organizational Consulting

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The consulting approach developed for General Learning Climates, Inc., typically involves "a baker's dozen" of disciplined phases that have been found to be effective in most consultancy situations. When practiced well, these phases permit the consulting process to flow seamlessly from one phase to another. Our practice is to identify the phases at the outset with the client and to pause periodically in the consultancy to discuss the phase currently being implemented to provide an opportunity for explanation and/or client feedback. Helping clients and consulting partners to remain lucid about "what-is-happening-when" serves to make consulting projects more deliberate and successful. The phases most often used are outlined and described below.

GAINING AWARENESS OF EACH OTHER: Initial contact with a new client system is usually arranged through a member of that system or of another client system who is familiar with our work.

ACCEPTING EACH OTHER AS CLIENT AND CONSULTANT: Interviews with key decision-makers of the new client system are the primary means through which sufficient mutual confidence is built to continue with the consultancy.

COMMITTING TO A CONSULTING INITIATIVE AND ITS TERMS: Developing a proposed consulting agreement describing the basic consulting relationship, compensation terms, outlining work schedules and initial consultancy stages, and specifying the means by which valid and reliable data will be gathered, is most typically the manner in which the client and GLC, Inc., commit to going forward in their work together. Additional plans and agreements follow after the data are analyzed and the desired outcomes are clarified.

GATHERING INFORMATION TO ASSESS THE CURRENT SITUATION NEEDS: Interviews with leaders, employees, and other stakeholders in the outcomes are nearly always employed to gain an initial understanding of the client's current state. Additional methods sometimes used include review of important documents (e.g. strategic plans, financial statements, performance indicators, etc.); tailoring or designing an organizational survey; working with focus groups of employees, customers, vendors, etc.; observing and documenting the dynamics of work processes (e.g. work flow, meetings, paper processing, field worker activities, remote offices, etc.); and other methods appropriate to the specific client situation. Summarizing the data into findings, logical data sets, graphs and charts, etc., is regarded as the responsibility of the consultant to assure objective and unbiased presentation of facts as best they can be known.

SPECIFYING DESIRED OUTCOMES AND DEVELOPING STRATEGIES AND TACTICS FOR THE CONSULTING INITIATIVE: Analysis of the summarized data is always done collaboratively with members of the client system to assure that the interpretation of the facts is appropriate and relevant to the client organization. A gap analysis process is used to clarify the desired changes from the client's present state to the desired state. In our experience, most client system leaders already subjectively know most of the facts of the current state. The objective data are used to confirm, disconfirm, describe intensity, point to organizational locations, and otherwise clarify the intuitive knowing, often with statistical evidence that can be used with others in describing problems without blaming anyone. Based on the data analysis, outcomes are described and the strategies and tactics to be used in the initiative are specified using both the client's and the consultant's experience.

ENGAGING AND ORIENTING THE PEOPLE REQUIRED FOR THE INITIATIVE: Frequently, both the client system and GLC, Inc., will be required by the planned initiative to involve key leaders and other members of the client system on an ongoing basis as advisors, subject matter specialists, or in other roles. When the initiative requires more than one consultant-facilitator, GLC, Inc., engages trusted Associates to provide the necessary assistance. All of the involved people are fully oriented to the initiative and collaborate in the execution of the activities.

IMPLEMENTING THE FIRST STAGES OF THE INITIATIVE AND ASSESSING IMPACT: Once the initiative planning phase is completed, the schedule drives the implementation process. More often than not, multiple aspects of the initiative are implemented simultaneously. Meetings are held with leaders to examine plans and policies that need changing; systems and work processes are altered and improved; training is carried out to assure that new policies are implemented accurately and that new work processes are performed appropriately. Evaluation of all activities is continuous throughout the implementation process with constant feedback to help assure that the initiative is being executed according to plan and is producing the appropriate outcomes.

MODIFYING TACTICS ACCORDINGLY: In collaboration with members of the client system and others that may be involved, initiative tactics and schedules are modified according to the evaluative feedback received during the first stages of the initiative. Changes being produced in the first stages of the initiative often produce unpredictable situations and behavior. During such periods of confusion, it is essential for members of the client system to be given reassurance, to continue communicating together, and to make the decisions that will keep the initiative on track and moving forward.

IMPLEMENTING THE NEXT STAGES OF THE INITIATIVE AND ASSESSING IMPACT: Initial implementation activities often surface needs for follow-on activities that extend and expand the initiative to include other parts of the client system. Again, evaluation of all activities is continuous while implementing follow-on activities with constant feedback to help assure that the initiative is being executed according to adjusted plans and is producing the appropriate outcomes.

MODIFYING TACTICS ACCORDINGLY: Meetings are held with appropriate members of the client system to assure that planning and execution stay in close relationship together with decisions consistently fact-based and the right people are involved to continuously monitor outcomes and make necessary adjustments.

CONTINUING THE INITIATIVE STAGES ACCORDING TO DECISIONS MADE COLLABORATIVELY WITH THE CLIENT AND CONSULTANT: As long as the initiative is demonstrating improvements in the organization and its leadership, planning and execution continue to assure improved performance remains consistent. New individual habits are learned only by consistent and repeated practice. Contrary to the oft spoken adage, practice does not make perfect. Practice makes permanent; practice produces habits -- for good or ill. Only perfect practice makes perfect performance. Monitoring and assuring perfect practice is often required for new habits to be developed so that improved performance becomes consistent.

DETERMINING WHEN CONSULTING SUPPORT IS NO LONGER NECESSARY OR APPROPRIATE FOR THE CLIENT: As each stage of the initiative comes to a close, summary reports are developed to document activities and outcomes and to collaboratively forecast additional stages that are needed.

SUMMING UP AND DISENGAGING FROM THE CONSULTANCY RELATIONSHIP: When the collaborative process produces a consensus that the plans have been fulfilled, a final report is developed to tie up loose ends and acknowledge the contributors.

GLC, Inc., consultancies have ranged from one-day assignments to consulting relationships that have lasted for more than ten years. In general, we are interested in consulting relationships that last long enough to contribute in some significant way to the improved performance of the client organization. This appropriate length of time is usually determined by four factors:

1. How long it takes for leaders to become clear about their current situation based on valid and reliable data and then decide upon new outcomes they wish to pursue.
2. How long it takes for new systems and work processes to be developed that will optimally implement the decisions determined by the leaders.
3. How long it takes for leaders and employees to learn the new systems and behaviors associated with achieving the desired outcomes.
4. How long it takes to evaluate the outcomes to assure that what the client meant is what they got.

When in a consulting relationship with a client system, the policy of GLC, Inc., is to regard the entire system as its client. The best interests of the entire client system are the primary focus of our consulting work. When confidential information is given to a GLC, Inc., consultant, that confidence is respected. Occasionally, a specific agreement is made between GLC, Inc., and a client system leader to assure that confidential information from an employee will remain confidential and that the system leaders will avoid asking a GLC, Inc., consultant to divulge the confidential information received from employees. GLC, Inc., consultants will work to assure that the most positive outcomes possible will result from any information received in confidence.

Most consulting work done by GLC, Inc., in the past thirty years has led either to additional work within the current client system or referral to other clients, or both. We are deeply appreciative of the trust placed in us by clients and strive constantly to merit their continuing confidence.