



## KEEP IT FRESH

- 1. Get proficient one section at a time.** Choose one of the course sections. Read it from beginning to end once a week or so. Practice the techniques until you feel proficient. Then, move on to another section.
- 2. Use the techniques every opportunity you get!** Seek out chances to actively participate in relationship management, defining your client's needs, consensus building, and addressing difficult issues.
- 3. Seek quality feedback.** Following every consulting session, hold a review session.
- 4. Use the techniques informally.** In everyday conversations, attempt to recognize each person's dominant communication style. Use the SSR-ing and funneling techniques when you hear problem statements and evaluation statements. Use consensus building strategies to address disagreements.
- 5. Complement your skills with our other training courses such as The Effective Facilitator.** In this course, we use the same dynamic teaching methods you experienced in The Facilitative Consultant to engage you in learning practical techniques you can apply immediately.

## WHAT'S NEXT?

### FACILITATION TRAINING

*Give your key people the training they need! Our dynamic instructors will provide your people with detailed tools and techniques for success.*

- The Effective Facilitator
- The Effective Facilitator: Virtual Link
- Advanced Facilitation Skills
- Facilitator Certification Prep
- Leadership Through Facilitation
- The Seven Separators of Facilitation Excellence
- Secrets to Facilitating Strategy
- Facilitation Skills for Trainers
- Facilitating Virtual Meetings: Comprehensive
- Facilitating Virtual Meetings: Essentials
- Facilitating Masterful Meetings
- Masterful Technical Meetings

*Call about our monthly class schedule.  
Ask about classes we can teach at your site!*

### FACILITATION SERVICES

*Avoid wasting valuable time! Our professional facilitators provide the expertise and techniques for focused retreats and planning sessions.*

- Meeting Facilitation
- Strategic Planning
- Systems Requirements
- Team Building
- Issue Resolution
- Process Improvement

*You spend valuable time when your group meets.  
Make your meetings highly productive and effective with our facilitation services.*

### STAY CONNECTED:



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**Leadership Strategies**  
The Facilitation Company

1-800-824-2850  
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# THE FACILITATIVE CONSULTANT MINI MANUAL

Take a Facilitative Approach to Consulting

## WHAT IS CONSULTING?

### Definition

Consulting is the **process** of providing **objective** expertise to an organization, group, or individual in order to **influence** a decision or action.

### Facilitative Consultant 8 Characteristics

- 1. People listen** because when you speak, you speak with authority.
- 2. Your clients believe you** have their interests at heart.
- 3. You are selected** more times than not because you have established a relationship, understand the need, have the expertise to meet the need, and have demonstrated the commitment to follow through.
- 4. Your recommendations are implemented** more times than not.
- 5. You have a high rate of "repeat business."**
- 6. You understand the consulting cycle** and utilize the cycle in executing client engagements.
- 7. You work WITH the client and not simply FOR the client.**
- 8. You define quality in terms of satisfying client needs.**

## RELATIONSHIP MANAGEMENT

### Definition

Relationship management is the process of **establishing and accomplishing goals** related to a **sustained involvement** with a person or a group of people.

### Stages

- Establishing & Assessing Goals
  - Goals are specific, imply action and involve the client
- Gaining the Client's Confidence
- Maintaining the Client's Confidence
- Recovering From Mistakes (GEO)
  - Grovel
  - Explain why it happened and why it won't happen again
  - Offer to make it up

### The Five Cs of Trust



## DEFINING YOUR CLIENT'S NEED

### Sample Questions

#### 1. Current Situation

- How does it work today?
- What is the overall scope?

#### 2. Problems & Implications

- What are the problems you are trying to solve?
- What are the implications of not solving this problem?

#### 3. Benefits

- What is it that you are hoping to achieve from this project?
- If you solve this problem, what will be the benefits?

#### 4. Solution Process

- What do you feel are likely steps in the solution?
- What challenges do you anticipate in solving the problem?

#### 5. Decision Process

- How will the decision be made? What is your time frame for making a decision?
- What are the next steps in moving forward?

#### 6. Constraints & Barriers

- What is your time frame for solving the problem?
- How much has been budgeted?

## BUILDING COMMITMENT

### SSR-ing Problems

When you hear a key problem (e.g., "One of our problems is..."), attempt to "SSR" it by identifying the size, symptom, and root cause

- **Size:** How much?
- **Symptom:** How do you know?
- **Root Cause:** Why?

### Funneling

When you hear an evaluation statement (e.g., "Great presentation"):

- Probe for **observations**
- Identify the **underlying value**
- Play it back to **validate** your understanding

### Effective Decisions

**ED=RDxCD**

Effective Decision = Right Decision X Commitment to the Decision

### STARS - New Opportunities

1. Sprinkle in relevant **Stories**
2. Talk early about the next phase
3. **Ask** for referrals
4. Seek **Regular** contact
5. **Send** information of interest

## DISC COMMUNICATION STYLES

### High Ds tend to...

- + Focus efforts on getting the job done
- + Address problems directly
- Δ Be overly-abrasive, pushy, competitive
- Δ Make decisions too quickly before having all the facts

**Key Factor: Being Done**

### High Is tend to...

- + Develop creative solutions
- + Motivate and sell others
- Δ Be so talkative, that they don't listen
- Δ Overlook details

**Key Factor: Being Heard**

### High Ss tend to...

- + Be supportive, dependable workers
- + Be accommodating and tolerant of others
- Δ Avoid dealing with issues until they become big problems
- Δ Be slow to accept change

**Key Factor: Being Liked**

### High Cs tend to...

- + Be organized and detail-oriented
- + Ensure procedures are followed
- Δ Be perfectionists and hard to please
- Δ Be overly-cautious; take too long to make a decision (analysis paralysis)

**Key Factor: Being Right**

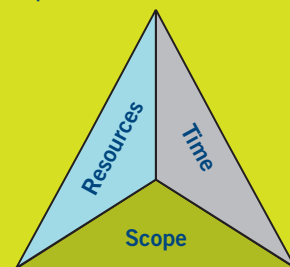
## PREPARING FOR AND EXECUTING THE PROJECT

### Performance Objectives

- **Project:** Complete prior to... Meet budget constraints of...
- **Business:** Reduce average time to... Increase sales by...
- **Satisfaction:** Have at least 70% of users indicate high satisfaction...

### Avoiding Scope Creep

- Clearly define scope up front: task list, deliverables list, business area diagram
- Define the scope triangle with the client to ensure they understand the impact of "scope creep"
- Define a scope change process, using examples when scope creep occurred



### Why People Change

- Higher Vision
- Desired Outcomes
- Fear of Consequences
- Pain

### Meeting Management

#### Meeting Types

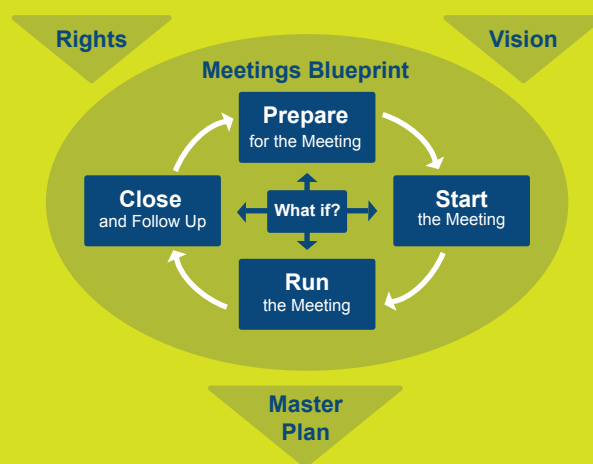
Status Meetings (Leader-Focused)

- Status Reporting
- Issue Identification
- Alternatives Identification
- Idea Generation
- Decision Reporting

Working Meetings (Team-Focused)

- Problem Solving
- Issue Resolution
- Alternative Analysis
- Idea Analysis
- Decision Making

### Masterful Meetings



## BUILDING CONSENSUS

### Consensus Definition

"I can live with it and support it."

### Why People Disagree

- Level 1** - Each have not clearly heard and understood
- Level 2** - They have had different experiences or hold different values
- Level 3** - The disagreement is based on personality or past history - **Take it to a higher source!** (Solves Level 3)

### Consensus Strategies

1. **Start with agreement** - "We seem to all agree that..."
2. **Confirm source of disagreement** - "Where we seem to disagree is..."
3. **Delineate the alternatives** (Level 1)
  - How much? How long?
  - Who and what's involved?
4. **Identify strengths and weaknesses**
  - Strengths of all alternatives first
5. **Merge the alternatives** (Level 2)
  - Identify one or two key strengths of each alternative
  - Identify a new alternative that combines the key strengths
6. **Converge on a solution**
  - "What is the least amount of change that would make this alternative acceptable to you?"

## RECOMMENDATION FORMAT

- **Finding:** Fact-based observation about the environment
- **Conclusion:** Impact of the observation on the organization
- **Recommendation:** Specific activity to address the impact with anticipated internal and external costs
- **Benefit:** Quantified advantage to the organization of implementing the recommendation
- **Risk:** Potential downside or obstacle that could impact the achievement of the recommendation

## MANAGING CHANGE RESISTANCE

### General Formula for Addressing Resistance

- **Approach Privately**  
Meet with the person one-on-one or with one additional person
- **Empathize with the Symptom**  
Praise the effort put forth, the level of participation, the quality of input, or anything else that is both sincere and worthwhile
- **Address the Root Cause**  
Identify the critical issue and causes for it. AVOID saying, "But..."
- **Get Agreement on a Solution**  
Seek a mutually-agreeable approach to addressing the symptom and root cause