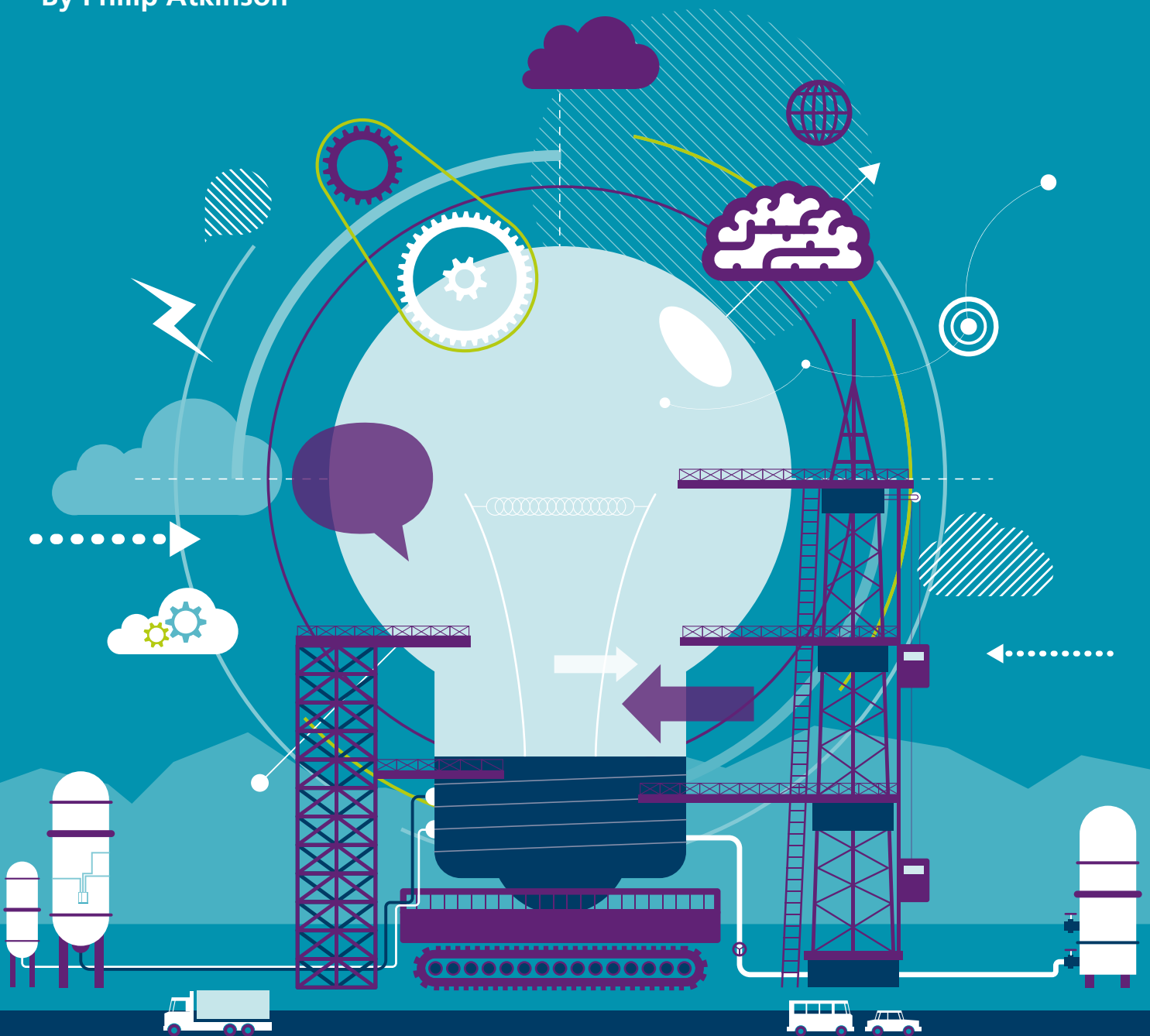


Becoming a Highly Effective Consultant, Business Advisor and Change Maker

By Philip Atkinson



"Many people are facing the challenge of driving change within their business or organisation. They may be a technical manager or specialist in any chosen field – and they will have a responsibility for driving change. In this article, Philip Atkinson outlines how managers and leaders can prepare themselves and make the personal transition to change maker, consultant, advisor, facilitator, executive coach or trainer. Most organisations need their people to develop and practise the ability to lead, manage and coordinate change implementation. Instead of relying on external consultants, it makes sense to develop internal change agents. This is about developing a culture of change leadership within the company or organisation. This article covers the main ways to develop these consulting skills to become of high value to the organisation".

The challenge of change

Organisations are under so much pressure to implement change that many can not keep up the momentum or the enthusiasm for continually renewing themselves. There are huge benefits for those which have painstakingly crafted and designed the business culture to welcome change. At the same time, they have equipped their leaders and managers with core change agent skills. What follows describes the journey that can be taken to become a highly valued 'change maker'

Taking managers and leaders up the learning curve

The skills to become effective in your change role can be learned. Many organisations develop their own 'intrapreneurial culture' to bring out the best in their senior and middle management staff. It's not just about equipping people with knowledge and skills, it is also about developing the right 'can do' attitude.

Being, doing and having

To be a change maker, you have to want to do it. As a leader or manager firstly, you have to decide what is to be your core competence. You may be a specialist in change management or management services, a superb IT or digital specialist, a fantastic lean guru, a marketing genius, a risk manager or professional services advisor, an empowering life coach, an enthusiastic trainer, a personal coach who generates high ROI for their clients, or a consultant and trainer implementing best practise in customer and quality improvement. You have to set out your stall and commit to a plan of action.

Success is how you communicate and behave

The skills needed to become a highly effective consultant are not just analytic, technical problem-solving skills. You must strongly develop your interpersonal competence. Of course, you need the analytic skills and core tools and methodologies to make a success of your projects, but fundamentally the real key to success is to do with how you communicate, behave and act with others.

Social confidence

This is not always natural for everybody. If you are not naturally socially confident you can become so. Confidence in any advisor, consultant, coach or trainer is essential to win the trust of your

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clients or sponsors. Naturally, they will want to invest in the best advisors who demonstrate high self-esteem and self-worth.

Key strategies for improving your self-confidence can be developed to ensure that you are on an equal par with your sponsor or clients so you will become a client's natural choice as their trusted advisor. It takes preparation, rehearsal and practise, and in this short article we will guide you through how to do that.

Empathy and authenticity

Successful consultancy interventions are based on the close fit between (internal or external) consultant and sponsor or client. This is based on developing a high degree of empathy with sponsors or clients. The tighter the empathy, the more trust and the deeper the consultant client partnership. Here I am talking about the consultant, coach or trainer who has a balance in how they communicate.

It's clear that if you want to position yourself as a highly respected change expert or adviser you must:

- Have the self-confidence to want it and believe you can do it
- Prepare yourself mentally and rehearse to develop deep client relationships
- Demonstrate empathy through active listening
- Create superior rapport building and interpersonal skills

Making Change Happen

Your role whether as a consultant, advisor, coach or trainer, must be able to manage change and that means managing ambiguity. No project is ever easy. There are always unexpected consequences, because you will be managing through sometimes difficult people who have overt and covert motivations, desires, ambitions, fear and anxieties – so no solution will ever be perfectly implemented. One thing you will have to do is master change, and that change starts with you.

Don't try to be perfect

You are not going to be successful all the time. In many ways, the more failure you experience the better, because with experience comes learning and wisdom. After all, knowledge and wisdom is gained from experience and that is often based on things that did not work as well as those that did. In many ways, the more setbacks and hurdles you experience, the more you learn and the more you will become skilled at handling your ideas being rejected or criticised.

Personal brand and business strategies

You have to start at step 1 – and that is to decide what you want to BE, DO and HAVE as a change maker or adviser. You have to decide precisely what it is that you are an ‘expert’ in and how you will manage your profile and relationships. A traditional way is for managers to start attending project management events and facilitating small problem-solving groups. Speaking up and volunteering to run training workshops and putting yourself out there is critical to deliver the confidence to fully execute your role.

You want to be in control, and not allow circumstances dictate or distract you. It is important to carefully orchestrate what you do and how you invest your time. Face-to-face interaction has to be a priority because the solutions evolve from that chemistry. Personally, I like working on several projects at the same time. This develops flexibility and provides enormous personal learning.

Personal brand and adding value

Nothing succeeds like success. If you provide real value to your clients, you find that the value you create and the success you achieve spreads by word of mouth to areas and other businesses that you would not have considered possible.

Vital areas include:

- Rapport skills with clients or project sponsors
- Methodologies to bring about change
- Action planning

Rapport skills with your clients or project sponsors

You need to be comfortable with developing your project sponsors and this means improving and honing skills by practising and rehearsing the influencing and communication strategies that are going to leverage you to become an acknowledged and trusted high performer. This also means developing a personal presence and resilience, so that people can trust you and know they are employing someone who will take their business performance to the next level.

Methodologies to bring about change

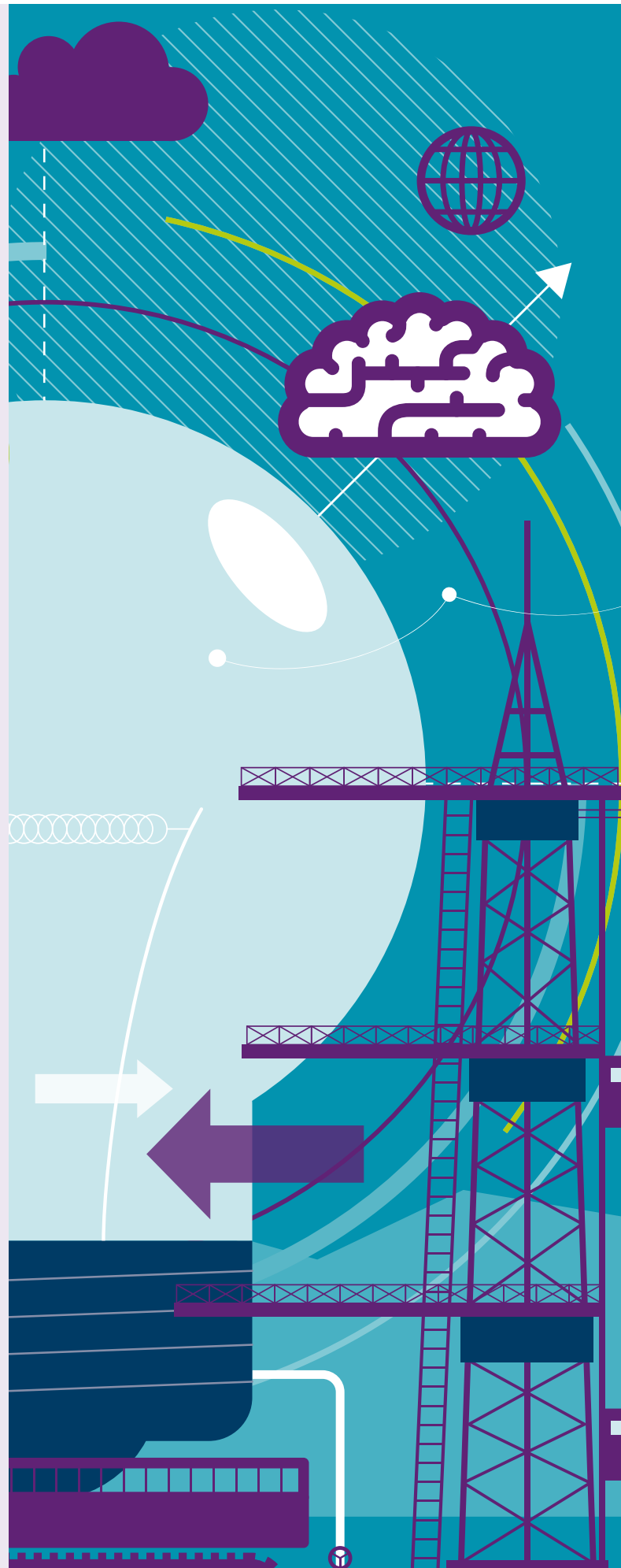
You will also utilise a methodology that outlines how best to sell your ideas to your client. This means understanding the consulting cycle based on action research, which is a valued and well-known approach to business improvement and can be applied to any specialism or business discipline.

Action planning

Think about your future role and the results you will achieve. You need to document an existing portfolio of clients and projects that you have overseen, and write case studies to illustrate the specific results you develop, and the benefits that accrue to the business. Design an action plan for moving forward to achieve your dreams as a trusted, highly valued ‘change maker’ in your field.

Brand you: Preparing yourself for the role

You will be pursuing the role of a ‘change maker’. Before you go ahead with your research you need to take a good look in the mirror to ensure that you are portraying the right profile or image for you. Think of yourself as a brand. You may want



SWOT Analysis graphic

Strengths	Weaknesses
Opportunities	Threats

to think through these four simple issues before undertaking a personal SWOT analysis.

- What is your level of expertise and what can you provide in terms of guidance, expertise and skills?
- What do you stand for?
- What are your values in how you transact business?
- What are your boundaries, and how will you defend them?

These are just some of the issues to be addressed. Before you go any further you need to assess your own SWOT analysis. Seeing yourself as a brand that you can develop, improve and build is critical. You must shape your brand. You must believe in it and you have to decide who you will become and what you will do, and practise those behaviours which support that. No one else can do this for you and although we know your professional and technical expertise is important, no amount of 'up-skilling' in technical expertise will deliver the results you want, without working equally on you as the brand.

To really understand yourself as a brand, first triangulate and assess how you are currently perceived by others. This starts by being honest with yourself, taking a good look in the mirror and assessing the likely impact that you have on others. Before you start asking others for their perceptions, you need to think about how you are perceived by them. The responses are all thought provoking.

SWOT analysis

As a business adviser and expert, you leave behind your own distinct signature. Others will form judgments, consciously and unconsciously, around how you have presented yourself. It is vital you create the right impression with existing and new sponsors or clients, and you do very much have control of shaping how others see your strengths and your forgivable limitations. You know, it is fine to have some limitations – no one is perfect, but you can choose which limitations to display.

Commit to an honest SWOT analysis now for truthfully assessing your own personal strengths, weaknesses, opportunities and threats.

As a brand representing your professional specialism, how do you stack up?

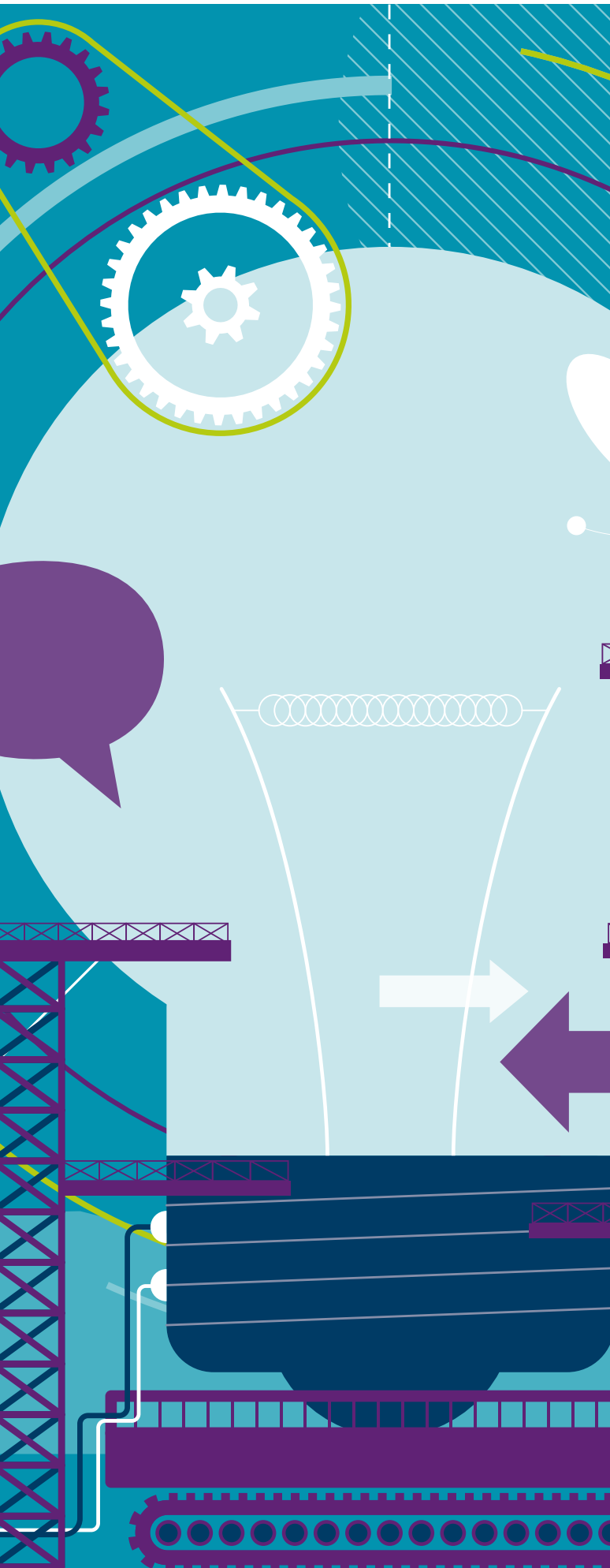
Strengths

- What strengths do you have?
- What are you good at doing?
- Make a list now

Weaknesses

- What weaknesses do you believe may hold you back?
- What prevents you taking action?
- Write them down now

The skills needed to become a highly effective consultant are not just analytic, technical problem-solving skills.



Opportunities

- Now consider the opportunities you have to improve yourself as a business expert? That is quite a revealing question and if you are curious you will ask others for their input. There is always room to become a better you.
- What opportunities do you have currently? And, more importantly, what opportunities can you create for yourself?

Threats

- What threatens your personal effectiveness and efficiency?
- What personal issues may restrict your effectiveness?
- What external threats could impact your behaviour and role?
- What personal threats or challenges do you have to overcome or circumnavigate now and in the future?

Only you can assess whether you fit the ideal model as the business expert or advisor that you want to portray. I cannot answer for you, but I can ask you to be curious and consider how you can best portray yourself to your public and your clients. At some later time, you may want to test your perceptions with friends and colleagues, and ask for their perceptions of how you project yourself.

Consulting services – supply and demand

If you want to attract the right project sponsors and clients, you have to have something of value. If the services, you offer currently are perceived as low value, you have to devote energy to change that perception, so your clients see you as a natural solution to their problems.

Whether you are an IT, a management services expert, or a coach or change consultant, you have to be able to offer your project sponsors something of real value.

Focus on your services using our service portfolio matrix. This is a four-pane matrix and is central in you refining your service provision and will ultimately provide a stream of sponsors and clients.

Working through this matrix is tough and will require you to revisit it many times, and working through it is central to becoming a highly valued 'change maker'.

The model or matrix has a vertical and a horizontal scale. The vertical scale refers to the current demand for the services you offer your project sponsors and clients. Here, you could measure traditional tangible benefits such as user or customer satisfaction, turnover, profitability, market segment and so on.

The horizontal scale looks at the services you offer in the future and their potential for growth in terms of your own defined success criteria. Some of your services 'Question Marks' or 'Dogs' will attract little interest from sponsors and clients and occupy the lower end of the scale, whereas others will be in high demand.

Your role whether as a consultant, advisor, coach or trainer, must be able to manage change and that means managing ambiguity.

Service Portfolio Matrix

High Potential Growth Low Current Value	High Potential Growth High Current Value
'Problem Children' Q2	'Stars' Q3
Q1	Q4
'Question Marks or Dogs' Low Potential Growth Low Current Value	'Cash Cows' Low Potential Growth High Current Value

Look at this in more depth. Remember, this is a general analysis – you will have to relate this specifically to your specialisation, business sector and your clients.

Now, focus on each of the four quadrants.

Quadrant 1 – Q1 is the area where you have little current demand and very little potential for growth as a change maker. We refer to these services as 'Question Marks' or 'Dogs'. The only way you can make these services work is by completely revamping and repackaging them. If you are delivering these services as your core offering, you need to think again.

If your core services fit in this quadrant, commit to the two 'Ds' either dump or ditch them in favour of providing new services or commit to 'invest', and design and develop new services and radically repackage and market them internally.

Quadrant 2 – Q2 is the quadrant which we refer to as 'Problem Children'. These are all the great ideas and innovations you have for providing a service, but you have not bottomed them out yet.

This is the most vital quadrant in the matrix. Future demand and your expert business advisor status is based on turning these creative ideas into tangible business services and products. If you fail to do it, they will fall into the dog quadrant. You have to invest your time and energy to making these products work. Unless they are 100% deliverable, your clients and project sponsors will never commit to them.

Quadrant 3 – Q3 is what we all want our services to become in the future. This is where we have high potential and high performance currently. How many of your services currently fit in this 'Star' quadrant? Here you have a unique service or product.

Ideally, you should personally commit to work on getting each of your services into this quadrant.

Quadrant 4 – Q4 is referred to as 'Cash Cows'. Here you are adding real value but this will only be for the short term until someone provides a similar service, digitises or automates them.

Now we come to the key-stone of your 'change maker' strategy and that is about applying a rigorous and robust methodology.

Methodologies

It is vital to create a high degree of confidence in your abilities with your project sponsor. This methodology covers five key stages in implementing any change. It is applicable to anyone

who is acting in a business expert or advisory role and is referred to as the consulting cycle and which works for all professionals.

The five stage consulting cycle

This is a methodology that is easy to follow and which is accepted by leading companies all over the world. This is the methodology enshrined in business transformation which has been a strong element in driving continuous improvement.

It is my methodology of choice because it is simple to understand and convey to others, especially when working with business advisers and experts who want to use a proven method to demonstrate to their sponsors and clients how they go about implementing their ideas and solutions.

Rational sequential process

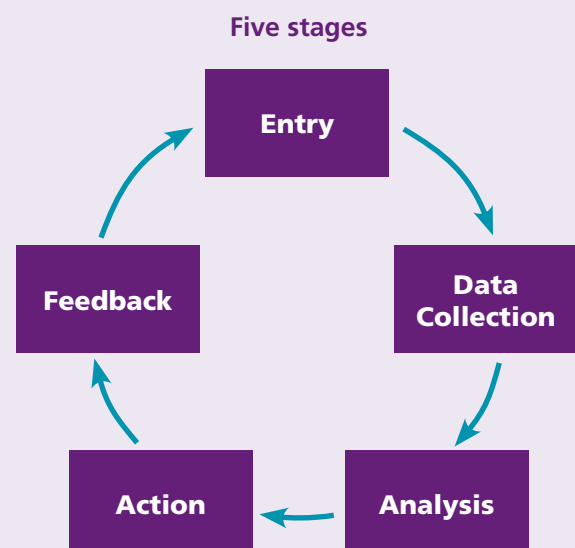
This works from the client perspective because it demonstrates how to define problems logically and sequentially, measuring the negative impact that they are having on the organisation, exploring how you can go about analysing the root causes behind the problem. Innovative ideas for improving the process or situation are developed and then implemented. The process is then controlled by setting up measures to illustrate how the change is being implemented and the tangible results that flow from your consulting, coaching or advisory and change work.

Credibility

Outlining this will support you in building credibility with your sponsors and clients, reassure them that you are using a proven methodology to guide your intervention, and that you have given this much thought.

The clients will also be confident that when they explain the process or methodology to others, they will win their approval. This includes fellow Board Members, Fellow Directors, Key Account Customers, Senior Management Team Members, Regulators, Investors and core Stakeholders. By sharing the approach, you can be sure the client and others will have much more confidence in your work.

The five key stages are outlined below and here are the main issues you will want to explore.



These five stages actually support you in the advisory, consulting or coaching work you are undertaking. This gives you additional credibility because this process follows the established scientific method of enquiry. This approach is a widely accepted methodology in most industries, and certainly in leading global organisations.

Entry

The first step is the entry phase. It is about entering into the project or organisation and is simply focused on two key things. The first is to do with leadership of the project. This is about agreeing who is going to lead the project, the principal project sponsors, and ensuring that the scope of project has been precisely defined.

This is the opportunity to work with the project sponsor and the client to scope out the breadth and depth of the project, testing understanding with key stakeholders, internal change agents, and those who will have to live with seeing the project implemented in their area of work.

Too many consulting, coaching and training initiatives do not devote enough time and resource to working through these issues about scoping the project and defining key parameters of what the project is set out to achieve.

Ensuring the completion of this activity can only support you in implementing lasting change and building your reputation as a change expert.

Data collection

The data collection phase is when we are gaining insight into the nature and severity of the problem. Much time will be devoted to setting up data collection points and measuring current performance. This is about establishing baseline measures against which you can assess and measure progress in the project.

Many projects that start in marketing, sales, HR and IT fail to collect data and develop initial baseline measures and metrics by which progress can be assessed. It does not matter in which specialism you excel or the professional service you provide. It is essential to assess the progress made right from the start of your work with the client. The ability to measure and track progress is certainly fundamental in supporting you in establishing your credibility.

Analysis

The first two stages of entry and data collection are vital to managing and implementing change of any variety. In Analysis we use our own specialist tools to assess the severity of the problem and how we intend to resolve it.

As a business expert or advisor, the tools you use will depend on the special skill and experience you bring to your client. Don't take the use of your specialist tools for granted. You may need to explain their use to the people you are working with and although you will have experience of using the tools in novel situations, you need to take people with you during this stage. You need to test for understanding with key stakeholders and the implementers to ensure that your analytical tools are explained, understood, accepted as valid and valued.

If you provide real value to your clients, you find that the value you create and the success you achieve spreads by word of mouth to areas and other businesses that you would not have considered possible.





About the author

Philip Atkinson specialises in strategic cultural and behavioural change. For the last 25+ years, he has been engaged as a change maker and consultant supporting organisations in strategic development, leadership, organisational design, post-acquisition integration, Lean six-sigma, quality management and culture change. He has partnered with a variety of blue-chip companies in industries ranging from pharmaceutical to genetics, the automotive industry to finance and banking and from NHS bodies to Local Authorities. He regularly presents at conferences and workshop sessions and has written seven books on change management. His articles and books can be accessed on www.philipatkinson.com Philip is also Director of Learning Strategies and Philip Atkinson & Co. Ltd. Tel 0131 346 1276 M: 07999 799286. His new book is shortly to be published and information is available here www.becomeahighlypaidconsultant.com

Action

In the action stage we focus on 'doing' things and implementing any changes. Here you will be expert in utilising your specialist strategies and tactics that will lead to resolving any problems and, in turn, lead to significant improvement. You know best what you can rely on. Here you set up the whole process of actioning and implementing your strategies and your ideas to bring about the needed change, and you will have your own well tested methodology to bring this about.

Feedback

This is the final stage where we discover how things have improved. This leads us to the feedback loop to tell us what is working well and what needs modification. Feedback is basically the process by which we set measures and put in place KPIs that reflect how progress is being assessed. Feedback tells us whether we are moving towards resolving the problems, or that we need to take other actions to ensure that improvements are accepted, recorded and made to work.

You will gather that the consulting cycle is well tested and accepted by large and small companies globally. The consulting cycle works because it breaks down problem solving into five distinct stages and highlights to the change maker what has to happen to proceed to the next level.

Overall, this cyclical process is valuable in giving your consulting, business advisory, coaching and training work a high degree of rigour and predictability. By adhering to this scientific approach, you will win the support of the majority of business people, your sponsors, clients, users and customers.

Going forward

Let me just summarise briefly. This article has been focused on examining the key issues that internal change agents need to confront if they are seriously going to commit to driving change from within rather than from outside the business. We have focused on the following key areas:

- The role of the internal change maker
- Social confidence
- Personal branding and business strategy
- Rapport skills with project sponsors or clients
- Use SWOT for self-assessment of skills and role
- Apply the service portfolio matrix
- Understand and adhere to the five stage consulting cycle
- Action planning

The purpose behind the article was to equip the would be 'change maker' with the attitude, the wherewithal and the key issues they need to develop to become credible change makers.

The opportunity to grow in many organisations can be quite limited – but an area open for expansion is driving the process of change. Not all solutions are structural, strategic or digital. Most solutions to organisational ills remain in changing behaviours and getting people to develop 'win-win' relationships focused on a central goal. I know a large number of senior, middle and first line managers who have been challenged with having to fulfil the change maker role, and this approach has been central in designing training and development sessions for them. I trust this will be of value to you.