

## Consultancy Process

A consultancy is a structured process that helps an individual or team think more expansively about a particular problem or dilemma. Outside perspective is critical to this protocol working effectively. Therefore, some of the participants in the group must be people who do not share the presenter's specific problem at the time.

Time: 50 minutes

Roles:

Presenter (whose work is being discussed by the group)

Facilitator (who manages the process, and sometimes participates depending on the size of the group)

Consultants (who discuss the dilemma)

Steps:

1. The presenter gives an overview of the dilemma and frames a question for the consultancy group to consider. The question and the quality of the presenter's reflection on the dilemma are key features of this step. If the presenter has brought any "artifacts" (memos, reports, photos...) that add to the understanding of the dilemma, there is a pause here to silently examine them. (5-10 minutes)
2. The consultancy group asks clarifying question of the presenter – that is, questions that have brief, factual answers. (5 minutes)
3. The group asks probing questions of the presenter – worded so that they help the presenter clarify and expand her/his thinking about the dilemma. The goal here is for the presenter to learn more about the question that was framed or to analyze the dilemma. The presenter responds to the group's questions, but there is no discussion by the consultancy group of the presenter's responses. At the end of the ten minutes, the facilitator asks the presenter to re-state the question for the group. (10 minutes)
4. The group talks with each other about the dilemma presented. What did we hear? What didn't we hear that we think might be relevant? What do we think about the problem? Members of the group work to define the issues more thoroughly and objectively. Sometimes they suggest solutions to the dilemma. The presenter is not allowed to speak during this discussion, and instead listens and takes notes. (15 minutes)
5. The presenter responds to the discussion, sharing with the group anything that particularly resonated for him or her. (5 minutes)
6. The facilitator leads a brief conversation about the group's observation of the consultancy process. (5 minutes)

### *Suggestions for Success in each Step*

#### Step 1

The success of the consultancy often depends on the quality of the presenter's reflection, as well as the quality and authenticity of the question framed for the consultancy group. However, it is not uncommon for the presenter, at the end of the consultancy, to have discovered what the real question is. It is sometimes helpful for the presenter to prepare a brief (1-2 pages) written description of the dilemma and related issues for the consultancy group to read as part of Step 1.

#### Steps 2 and 3

*Clarifying* questions are for the person asking them. They ask the presenter "who, what, where, when and how." They are not "why" questions. They can be answered quickly and succinctly, often with a phrase or two.

*Probing* questions are for the person answering them. They ask the presenter "why" (among other things), and are open-ended. They take longer to answer, and often require deep thought on the part of the presenter before answering.

#### Step 4

When the group talks while the presenter listens, it is helpful for the presenter to sit back slightly from the group. This protocol requires the group to talk about the presenter in the third person, almost as if she or he is not present. As awkward as this may feel at first, it often opens up rich conversation and allows the presenter to sit back and listen in a potentially less defensive way.

It is the group's job to offer an analysis of the dilemma or question. It is not necessary to solve the dilemma or offer a definitive answer.

Suggestions for the presenter: Listen for new ideas, perspectives and approaches. Take notes. Listen to the group's analysis of your question/issue. Listen for assumptions - both yours and the groups - implicit in the conversation. If you find yourself feeling judged by the group, remind yourself that this is not supposed to be about you, but about the question you have raised. Remind yourself that you asked the group to help you with this dilemma.

#### Step 5

The point of this step is not for the presenter to give a detailed response to each point in the group's conversation, nor is it to defend or further explain. Rather, this is a time for the presenter to talk about what were the most significant comments, ideas, and questions the presenter heard, including any new thoughts or questions that came up for the individual while listening to the consultancy group.

#### Step 6

Debriefing the process is key to building an effective consultancy team. Don't shortchange this step.