


A professional meeting in a modern office. Three people are seated around a table, looking at a laptop. The man on the left is smiling. The woman in the middle is holding a pen and looking at the laptop. The woman on the right is looking at the laptop. The background shows a large window with a view of a city.

sage

Zen and the Art of Consulting


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A man with short, light-colored hair and glasses, wearing a dark suit, white shirt, and dark tie, is speaking. He is gesturing with his hands. The background is a lush green indoor plant.

“My biggest worry is the relevancy of our core products.”

- Barry Melancon
President of the AICPA

How? vs. What matters!

BECOME: 	
How do you do it?	What refusal have I been postponing?
How long will it take?	What is the commitment I am willing to make?
How much does it cost?	What is the value of it to me?
How do you get those people to change?	What is my contribution to the problem?
How do you measure it?	What is the judgment I need to make?
How have other people done it successfully?	What do we want to create together?

Consultant or Surrogate Manager

Consultant

is a person in a position to have some influence over an individual, group, or organization, but who has no direct authority to make decisions.

Surrogate Manager

is a person in a position who acts on behalf or in place of a manager.

Short quiz: True or false



1. People will assign you an intent whether you want them to or not.
2. Their perception of your intent will largely influence the meaningful flow of information during your conversations.
3. The meaningful flow of information will affect your ability to create a system that will create greater freedom for them to succeed.
4. You can strongly influence people's perception of your intent, even without saying what it is.
5. Question for dialogue: Why not state your intent?

Consulting Assumptions

- Problem solving requires valid data.
- Decision making requires free choice.
- Effective implementation requires customer commitment.

Consulting Goals



- To solve problems so that they stay solved (for as long as possible)
- To establish a collaborative relationship
- To ensure that attention is given to both the technical problem and the emotional well being of the customer
- To develop customer commitment



Sprezzatura

Which of these best describes the type of relationship you would like with us?

- Subject matter expert
- An extra pair of hands
- Collaborative partner

Consulting Levels – FORD Model



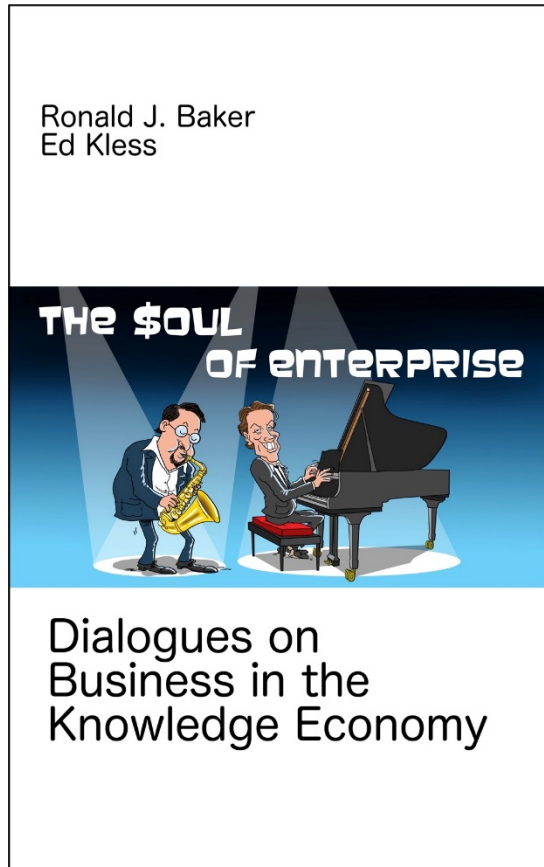
- Findings
- Options
- Recommendations
- Decision

Marston's Circle of Scope



From compliance to consulting

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Thank you