



# Book Flawless Consulting

## A Guide to Getting Your Expertise Used

Peter Block  
Wiley, 1999

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### Recommendation

Expert consultant Peter Block’s step-by-step guide details how to become more successful in your client-consultant relationships and practice. Block provides process-relevant checklists and topical illustrations that are particularly useful for people who are new to the trade. His message is clear: Dress down, follow your mind and heart, and build relationships. Being an expert consultant does not require gray suits or smart presentations – the only thing “smart” might be the downloading of checklists to your smartphone. The rest is skill and hard work. *BooksInShort* recommends Block’s clear, applicable approach to consultants, managers, coaches, doctors, teachers and anyone who works individually with clients.

### Take-Aways

- “Flawless consulting” is a step-by-step process everyone can learn.
- Look beyond your client’s technical problem and build a relationship.
- Define your role as an “expert,” a “pair of hands” or a “collaborative” consultant.
- No matter which role you take on, be true to yourself.
- Build good contracts based on “mutual consent” and “valid consideration.”
- Decoding organizational communication takes time and attention.
- Add your own discoveries to the information your client gives you, and dig deeper to find the root causes of any problems.
- “Whole-system discovery” creates involvement, but you might have to give up your “expert role.”
- Be aware of client resistance. Pick up cues, address concerns and listen.
- Successful consulting means caring for your client.

### Summary

#### The Weight of Authenticity

Consulting is a skill that everyone can learn. Your goal is to execute the skill successfully. You may influence an organization as an “internal consultant” in a supporting role, or clients may hire you as an “external consultant” with no direct influence or implementation power. At times, you will find yourself in tense situations, caught between what your client wants and your limited ability to make concrete change happen.

“The consultant is as much a learner as any client. We in fact are often more changed by our consultation than the client, and this is as it should be.”

One step toward releasing that tension is to work on your “technical skills,” “interpersonal skills” and “consulting skills.” They will help you when the emotional and relationship aspects of consulting pose other challenges. You might present the perfect implementation plan and still get resistance from your client. You have to decide whether to push for your plan or to let it go. In these moments, you have to trust yourself and your instincts. Trusting yourself is a pivotal asset.

“There is a consulting professional inside each of us and our task is to allow that flawless consultant to emerge.”

Consultants need more than technique; they must go beyond the factual problems they’re hired to solve and advance to exploring the softer side of client relations. Your

ability to offer a program, a process and the right procedures is the beginning of the consulting journey. You must diagnose and openly articulate potential conflicts relating to trust and openness. Your main objectives include creating a cooperative bond, resolving issues so they don't crop up again later, paying attention to the technical side of problems, and coping with relationship issues.

“The critical point to consider is whether it is really in your best interest to go ahead with a project.”

Whether you assume the “expert role,” the “pair-of-hands role” or the “collaborative role” for joint problem solving, “flawless consulting” requires being genuine and giving simple, direct responses to client questions. The aim of each role is building a long-term connection with a client. Should your client exclude you from important activities within the company, discuss your concerns candidly. If you don't speak up, the client won't know what's bothering you. Sincerely articulate your experiences and observations throughout the consulting process.

## Mutual Expectations

A consulting contract means agreeing on each party's expectations. Both parties enter the consulting relationship voluntarily. Both agree on the value they expect to receive. Applying these two principles may be more difficult when you serve as an internal consultant, a situation in which the client assumes you will experience some gain without explicitly naming what it is.

“I never accept the presenting problem as the real problem without doing my own discovery and analysis.”

Specific skills and techniques help set expectations. Ask about the client's organization – determine which people in the company are more important than others. Inquiring directly about power and control will reveal a lot. If you feel the meeting to complete your consulting contract is not going well, say why. Starting the contracting process with open, direct dialogue puts you in the driver's seat and improves your chances of success.

“Get out your laptop or a pencil and a piece of paper and make two columns: essential wants and desirable wants.”

Getting stuck during the contracting process is normal. Move ahead by acknowledging its inherent dilemmas, and finding strategic solutions. Decoding how people communicate in your client's organization will help you understand what they mean when they fear being forthright. Your clients might say, “I'll get back to you,” when they really mean “I don't want to do it.”

“Most consulting projects get started because managers feel pain...When the organization feels the pain, managers start to describe for themselves why the pain exists.”

You might feel that something is going on behind the scenes, but your client won't explain. You can keep going without saying anything, adjourn, address the point directly, or create time and space for reflection. You could decide to review the contract formally, or even end it to minimize your time and effort. These solutions are all possible, but successful contracting is never guaranteed. These contracting rules spring from Gestalt psychology, which posits that “the responsibility for every relationship is 50-50.” Look at all your client's wishes as legitimate wants; promise only what you are going to deliver; and make agreements only with those in the room. You can't make an agreement with people, like your client's line managers or team members, who are not present.

## Discovery

Engaging with a client means painting a starting picture of the client organization. Keep the discovery process transparent. Depict clearly what led to your client's problems and what keeps the problems alive. Go beyond technical considerations and observe people interacting.

“Every problem facing persons or organizations has layers, like an onion...As you go to deeper layers, you get closer to causes and actionable statements of the problem.”

Clients have their own way of describing the nature and cause of their problems. How a client sees an issue often does not reveal the true underlying problem. Add your own discoveries to the information your client gives you, and dig deeper to find the root causes. Create value by redefining the problem statement the client first discussed with you. Your client already tried unsuccessfully to solve the initial problem. Diagnosing the real underlying issue brings you closer to a workable solution. The “presenting problem” may not be the real problem. The client called you in to help for a reason, and you must discover that reason.

“Much of organizational communication is in code: When people mean ‘I don't like it,’ they express it by saying, ‘I don't understand it’.”

Adopt the “third-party approach,” study the situation and make recommendations for improvements that don't involve your client's organization. You remain the independent, detached expert and lead designer of the solution. A downside can be selling your solution to management, which did not join in the process of discovery.

“The truth spoken in public is a rare commodity in most institutions. The success of an implementation strategy will depend on the quality of the conversation that begins it.”

The “whole-system approach” involves managers and teams, since the change affects both. The decision making stays within the organization, and you involve team members who have to make the solution work. This engenders a higher commitment to the solution and sets more realistic targets. The downside is that you may have to redefine yourself as facilitator of the solution. Your role may shift from being an expert about discovery to leading people through discovery.

“The key to understanding the nature of resistance is to realize that it is a reaction to an emotional process taking place within the client.”

If you decide to pursue this holistic approach, brush up your facilitation skills and your ability to design learning experiences. Encourage your client's staffers to question their own beliefs. Given the right conditions, the organization will prosper and tackle its current and future challenges.

## Resistance

Be prepared to encounter resistance. Your clients gave up a certain amount of control just by allowing you into their organization. Loss of control and increased vulnerability create client discomfort. Consider the possibility of resistance throughout the consulting process.

“Computer technology and the virtual world it creates is amazing, but it is just...technology. It is not a substitute for relatedness, authenticity, meaning or being of service in the world.”

Become aware of client opposition. It starts with subtle signals. Speak the unspoken. For example, if your client pushes back and doles out curt answers, say, “You are giving me very short answers.” Then go a step further: If your client refuses to own an issue or its solution, you might say, “You don’t see yourself as part of the problem.” Your client might flood you with information or details. Point that out. A statement as simple as, “It’s too early for final answers” helps you react to a client who’s pressuring you for solutions. Listen to the client. Rewards will come if you say nothing. Be quiet and let the client respond.

“If you avoid information that creates tension, then why does the client need you as consultant?”

Dealing with resistance is a difficult area of consulting. Clients’ negative sentiments are part of the process. Embrace confrontation rather than trying to defeat it. Talking clients out of their feelings and reasons for resisting might not work. Try it, but don’t be surprised if you fail. Detach yourself from their resistance. It is not personal. Just be curious about it as a phenomenon and explore its roots. Most often, opposition results from underlying conflicts that your client faces. Resistance is integral to your learning process. Client resistance isn’t a reflection of your competence; it means you have dug deep enough to find something of value and importance.

## Feedback and Action

Some 70% of your contribution and impact comes from how you present your discovery and manage the subsequent meeting, which should focus on future action. Choose assertive language for your presentation. Say what you have found and how you see things. Avoid assigning blame. Be descriptive, focused, specific, brief and simple. Support and confront the client. Show that you understand the circumstances, however complex. Point out differences between the client’s view of the situation and your own. Pursue these 10 steps before, during and after the meeting:

1. State the terms of the contract.
2. Present the meeting’s agenda and format.
3. Give a succinct overview.
4. Make your recommendations.
5. Solicit the client’s response.
6. At the midway point, ask the clients if your solutions address their problems.
7. Ask for the go-ahead to apply your solutions.
8. Verify that you’ve covered all client issues.
9. Make sure you received what the contract owes you.
10. “Give support.”

“It is a mistake to assume that clients make decisions to begin projects and use consultants based on purely rational reasons.”

Timing matters. Allocate no more than 15% of a meeting’s time to steps one through four. For example, in a meeting that lasts an hour, ask for client reactions after about 12 minutes. Your meeting’s goal is to lead people into action and to create discussion and involvement. Be aware that this will provoke unease and nervousness, but you and the client can reflect on your mutual journey and move to implementation.

## Consulting Is Caring

Successful consulting means caring for the other party. The challenge is showing you care by the way you execute. Adopt a “learning-over-teaching approach.” Depending on your cultural background, you might envision a teacher standing in front of the room while students sit and listen. This approach centers on the teacher and has little to do with learning. Real learning often happens outside the classroom, or when you try and fail to put something together with the client at work. This struggle can lead to substantial value creation. Questions can be powerful, so emphasize the client’s questions and not the answer. Take “how” questions as warnings and offset them with “why” questions. Determine whether your client should vest in a certain problem.

## Organizational Resistance

Paul Uhlig is a thoracic surgeon who is familiar with the realities of operating rooms, intensive care units and other patient areas of a hospital. He has experienced firsthand the frustration of well-trained health professionals who work hard to offer good care without achieving improvements in the general provision of health care. Patients and their families often don’t benefit from the staff’s efforts. Patients suffer duplicate processes and angrily ask personnel, “Don’t you talk to each other?” Uhlig and his team decided to change their working style, so that no patient or patient’s relative would ask that question again.

Following the precepts of flawless consulting, team members initiated three changes: 1) They renegotiated their social contract; 2) introduced a consultative process using the whole-system approach, and 3) formed partnerships among health care staff and patients.

The team pioneered daily collaborative bedside rounds with patients and their families – a very different approach than the role of lofty expert that doctors commonly take on in hospitals. When doctors spoke directly to the patient and family rather than just to one another, they saw results: “Recovery after surgery happened faster, deaths and complications decreased by half, and people found new meaning in the experiences of being a patient and of being a caregiver.”

Uhlig and his team received an award, and other hospitals invited him to implement similar approaches to patient care. Paradoxically, this application of the flawless consulting philosophy in a real-life setting does not have a happy ending. After demonstrating measurable outcomes and receiving national recognition, Uhlig quit his job because the organization employing him did not embrace the changes he initiated. He had called the status quo into question, and the organization resisted. Its leaders

perceived a loss of control. This shows how much of a consultant's success depends on the relationship with the client and the organization. As Uhlig said, "It all sounds so simple," but it "remains so rare."

## About the Author

**Peter Block** is a consultant and speaker in organizational development, community building and civic engagement.

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