

A Framework for Consulting

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Introduction

Organisations across the globe are facing waves of changes spurred on by the global COVID pandemic such as: the acceleration in the adoption of technology; the rise of new business models; and evolving workforce; and the economic pressures exerted by months of lockdowns. The impact on consultants of these factors is: the rise of virtual consulting using digital and collaborative platforms; the demand for instant consulting with a drive for flexibility and to deliver value as soon as possible; and the increase in collaborative and continuous consulting to create ongoing value for clients.

In order to meet such demands consultants are faced with having to embrace the digital revolution and in many cases reinvent themselves to meet changing client needs and expectations. However, despite such shifts at the heart of consulting still lies the need to add value and to do this in practice requires consultants, whether they are internal or external to the organization, to apply an iterative approach to how they enact consulting. One approach for doing this is through the application of the consultancy cycle for change which can be adapted to suit different situations (Hodges, 2017).

The Consultancy Cycle for Change comprises of seven phases: initial contact; contracting; inquiry and analysis; intervention; implementation; evaluation; and transition. Each of these phases informs the orientation of the previous and subsequent phases and each varies in length and complexity depending on the nature of the consultancy assignment and the client's expectations. Some of the phases, such as contracting and evaluation are on-going activities throughout a consultancy assignment. For example, consultants may need to return to contracting discussions each time they meet with a client in order to validate progress, correct any misunderstandings and agree on what to do next.

This iterative cycle provides a route map to be used by a consultant during a transformation. However, like all conceptual frameworks, it does need to be adapted to the specific context in which it is being applied and consultants, whether internal or external, need to be familiar enough with the cycle to be able to use it flexibly and to re-visit the different phases within it, when necessary, and to do so jointly with their clients.

The consultancy for change cycle is a collaborative approach involving both client and consultant. For instance, inquiry is a joint process which aims to understand the client's issue and its root causes so that appropriate change/s (intervention/s) can be identified to address them. However, this is the phase which clients and consultants may be tempted to skip on the assumption that they already have sufficient information about an issue and its causality. This is a misguided assumption which can lead to change being implemented that address the symptoms and not the underlying causes of the problem. So, inquiry needs to be done collaboratively to provide evidence-based data to help identify potential change/s. Likewise the identification and design of appropriate interventions should also be done collaboratively and derive from careful inquiry.

Since interventions may function differently in different organizations, flexibility in the application of any intervention is necessary. The purpose of interventions is to improve the effectiveness of the organization, team/s and/or individuals and so care must be taken in selecting the most appropriate intervention since failed interventions cause significant costs in terms of the time, money and motivation of organizational members. There is, therefore, a need for interventions to be practical and business-focused, while also being underpinned by a strong evidence-based foundation and rigorous learning methodology.

The ownership of the intervention has to be clarified so that the client and consultant both understand clearly how the consultant will help the client achieve the objectives of the intervention. A consultant should, whenever appropriate, be involved during the implementation of the intervention, although they will eventually need to disengage because the responsibility for sustaining the change needs to be transferred to the client.

Transition of ownership of the intervention to the client is vital to ensure the ongoing sustainability of any changes implemented. Being clear about the boundaries of the consultancy work, and knowing the correct time to withdraw or transition, is essential. Disengaging will be much easier and clearer when the contracting process has been done effectively. In other words, if the consultant's role and the client's expectations about the outcomes for the consultancy assignment have been clarified, the transition will be both appropriate and timely and the engagement not just left to fade away. To help move towards effective transition, the progress of the change should be monitored and measured as it is happening since this enables adjustments to be made to help realize benefits, and also provides feedback on how people feel about the change whilst it is still being implemented.

Knowing what influences and determines the sustainability of change is a key part of the consultancy cycle. Determining whether or not change has been sustained will involve evaluation of the benefits achieved, as well as management of the risks associated with the change. Attempting to lead a transformation without metrics or a risk assessment is like trying to fly a plane without instruments. On a short flight on a clear day consultants might be able to reach the destination safely, but once they hit clouds, they will find themselves in serious trouble. So, it is important to monitor and review a transformation in order to identify areas which need to be adjusted and adapted to ensure that the change is effectively implemented and the intended benefits achieved.

At its core, the consultancy for change cycle is bolted together with: ongoing stakeholder management; a client-consultant relationship built on trust, transparency and honesty; ongoing dialogue and feedback in order to understand people and the issues they face in organizations, and to engage people with change. Applying the consultancy cycle compels consultants to ask, "What does an effective change intervention look like that will engage individuals? How can we facilitate collaboration and learning in everything we do? Successful consultancy integrates an understanding of how to engage people in change, it identifies what motivates people and it examines how they react to change. Through the adoption and adaption of the consultancy cycle for change, consultants can effectively engage people in change rather than imposing it upon them which is vital at a time when organisations and the people within them are facing unprecedented continuous change.

References

Hodges, J. (2017) Consultancy, Organization Development and Change. London: Kogan Page.