

Internal Consulting: A Survival Guide

Plan to consult in your own organization? Hope to stay there a while? If so, there are some things that you need to know and do in order to preserve your sanity long term. Internal consulting can be tough duty, but the rewards are high and the potential is great. A little bit of time spent soul-searching and planning pays off big in the long run. Internal consulting has the opportunity to put people in some of the most untenable positions. There are a number of situations in which a person, working as an internal, is part of the system and at the same time is trying to remain detached from the system.

Imagine, if you can, a large conference room, a table filling most of its space, around which a number of executives sit. The conversation is around a planned organizational change. The executives are full of energy, ready to take immediate steps, marshaling resources, sending communications, issuing instructions and edicts to the rest of the organization. Somewhat unexpectedly, a different voice emerges, focusing the attention on issues of process, of employee involvement, and of assumptions that the executives are making but not voicing. The conversation takes a sudden turn, energy moves in another direction, and they slowly begin thinking through the areas that they had missed. Several of the members are somewhat perturbed by the intervention, openly criticizing their consultant for the change in direction and the sudden loss of focus around their action planning. As they slowly leave the room, several of the members talk among themselves about why they bother keeping a consultant in these meetings if they will only get slowed down. Others highly value the input and feel that the confrontation served to keep them on target and more rigorous.

Later the consultant, an internal, stops and begins to think. “What have I done?” “Have I ruined my career?” “Should I have been more aggressive in implementing the executives’ ideas rather than sending them in another direction?” “Should I be an advocate of process or an implementer or their ideas?” “What is the best course of action?” “After all, my career is tied to these people. They impact my performance appraisal and my salary actions.” Even though the consultant was fully engaged in the process and working to manage group dynamics, avoiding group-think and rush to action, there was still an element of the group not being pleased. What would happen if the next time the group confronted the consultant, wanting more press for “solutions” and less focus on process?

The internal consultant occupies a precarious position in the organization. They are part of the system, have roles and responsibilities set in the organization’s success, often responsible for line items or for portions of the business plan, but are often called out to consult with the leadership teams about the accomplishment of much larger business objectives than they typically work with. It is not unusual for the consultant to be consulting about issues that significantly impact their own job security and career potential. Sometimes the areas will significantly impact the work units they manage. In these cases, they are vested in both the current system and in the change. How do they stand for the change and stability at the same time?

In describing this dilemma, let’s get clear about some differences. Internal consultants have a variety of roles in different organizations, many of them in the managed change arena. To be consulting, there are some assumptions about consultative position and intervention stance. Schein lists three

consultative positions: expert resource, doctor/client, and process consultant. All are valid roles to play for clients, but it is very important to understand which of these roles you play. Let's say, for instance, that the organization is rolling out an initiative with a predetermined method and outcome. Your role is to provide the expertise of implementation to the system owners who now have the chore of following an initiative. The more the outcome is predetermined the more you fall into the realm of doctor/client or pair of hands.

	Expert Resource	Doctor/Client	Process Consultant
Outcome	Fixed by skill area	Set by consultant	Determined with consultant
Process	Controlled by consultant	Controlled by consultant	Influenced by consultant
Locus of control	With consultant	With consultant, influenced by client	With client
Approach	Prescription	Prescriptive	Descriptive
Skill set (compared with system)	Unique or redundant	Unique	Determined by what is not in the client system.

Internal consultants live with a daily balancing act between being like the system and different from the system. To operate effectively in a consultative role, you must offer something different in terms of skills, abilities, and perspectives than what already exists widely in the client system. If you are operating redundantly, you are probably not operating effectively in a consultative role. Your role is to stretch the system. You can't do that by being identical.

Determine a strategic focus

One of the most important items to an internal consultant is to understand how they intend to impact the client system. All consultants must be clear about why they are there and how they expect the client system to benefit from their presence. You need to be able to articulate it and live it out so that your clients totally understand your position and the role you are attempting to play.

Know your limits

Here is the time to be your own consultant/client and get very honest about your abilities. It often helps to get some outside feedback in these areas. What is important is for you to understand who you are and what you will or won't do. Internals don't often recognize the power of their ability to say no. It is clarifying and empowering. Just know when and where you will say yes or no to different roles or types of work. In order to do that, determine the areas in which you can comfortably operate. You know what you're good at. Make a list that matches with your strategic focus and the organization's direction. After that, identify some stretch areas and make a plan to grow into these areas. This does a number of things. First, it keeps you in the learner's perspective and makes it easier to relate to the

change processes going on with your clients. Second, it helps you grow and generally be more interesting to your clients..

Become an expert in your field

Internals are rarely received with the same esteem as external experts. One of the reasons is exposure, the second is because they often don't have the same sort of skills, training, and experience as others in the field. So, the simple solution is to spend time becoming the expert in your field that your clients will recognize. Read, attend conferences, and network. Write white papers about your findings. Present at conferences and professional associations. Build credentials in your field that your clients will recognize and respect.

Be methodologically consistent

Here's one of the places of deep differentiation that you will find with the experts in the field. There are many different models and beliefs about human systems and the ways in which you intervene in them. Get out your toolkit and really learn what's behind your exercises, methods, and interventions. Both you and the participants in your events will feel the disconnect between exercises build on conflicting models of behavior. It is a seemingly small thing, but the payoff can be huge. As a small example, following a participative problem solving exercise with an autocratic implementation will cause more problems than if both were either participative or autocratic, or you simply reversed the situation to autocratic problem solving followed by participative implementations.

Follow a model

There are a number of these currently available in the literature, most of which are built to follow the discovery learning cycle. Find one that you like, believe in, and follow it. Your work will move to new levels of effectiveness. You begin to learn the ins and outs as well as begin to get creative through your experience. You might even experience a level of branding associated with it. Also, when it stops working, find another!

Contract! Contract! Contract!

Internals do not always think of contracting in the same perspective as externals. It is, though, equally important. In the opening scenario, a good contract with the leadership team would have been the necessary requirement to provide a solid footing for the consultant and to discuss the mumbblings of the disgruntled participants. A social contract is absolutely essential to handle the role shifting that many internals experience as well as the crossing of levels within their own organization.

Be Genuine

The issue of presence is as important to the internal as the external. It is well worth your time to spend some time thinking about how you present yourself. Think about it as branding. You work on your mental abilities, work on your emotional and spiritual elements as well. There are many ways to do this. Get a coach, join a growth group, or sign up for courses that offer deep personal development. After all, the thing you are really offering your clients is your self. Be clear about it, own it, and share it.

Connect with your spirit

In a sense, just be large in your work. Do it through the connection with spirit. This will help call the dilemma posed by the conflicting demands and the questions posed by whom you should please in the client system. It will still your mind and will solidify your work. Ultimately, it will make a huge difference for your clients as you begin to lean into the power that spirit brings you.

Avoid these common traps

- Be clear about the difference between process consulting, doctor/client, and expert resource. Define your role, contract for it, and then live it out.
- De facto management - watch out for this. Very often an individual in a consulting role can begin to cross the line between assisting others' process and actually stepping into a management role that belongs to the client. While clients may welcome it in the short term, it can have some disastrous results.
- Assessing without a contract is espionage. There is a delicate balance between when you assess as a consulting intervention, and when you observe as a member of the system.
- Don't talk about your clients! Maintain appropriate confidentiality when you are moving about the organization.
- Maintain trust. One of the most damaging things an internal can do is violate trust, not just with the immediate clients, but with the larger organization. Be sensitive to what others see in you and how you are impacting the system.
- Be respectful. All in all, consulting is the business of human interaction. You can be as confrontive as you need to be, as consistently as you need, as long as you are respectful of the basic humanity of the people involved.
- Honor and understand resistance. More than ever, I have learned that resistance is a good thing and it informs you about the system. It simply means you are getting close to a value. Listen and learn from it.

Overall, the internal consultant has the opportunity to create great change from within systems. Following the items outlined here can greatly expand the longevity of effectiveness one can expect within their organization. I have often called it "consultant half-life", in which the consultant becomes less and less effective over time within their organization. The concepts presented here can make the difference between a short and long career.