

Finding Your Way in the Consulting Jungle

A Guide Book for Organization Development Practitioners

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Chapter 3: Types of Consultants

After leaders recognize that they have significant issues for which they require some form of external assistance, they are about to step further into the depths of the consulting jungle! Now they must determine precisely what kind of consultative assistance is most appropriate to help address these issues.

A critical prerequisite to surviving the consulting jungle is the leader's ability to distinguish among the four distinct types of external resources who call themselves "consultants." We have elaborated on Peter Block's original set of three types (1981, 1999) and developed four consultant types. These are "extra-pair-of-hands," "training/educational specialist," "technical expert" (techspert), and "OD consultant." Because each of these four consultant types has unique, distinctive capabilities and tends to use different strategies and methods, each can be used most appropriately in different situations. If agents or leaders select a consultant with qualifications that do not fit the situation, all parties are likely to experience problems--the most obvious being that they may not achieve the intended results.

The Four Types of Consultants

A primary distinction among the four types of consultants is the focus of their activities and interventions. Table 3.1 provides an easy reference.

We begin this chapter with comprehensive descriptions of each of these four basic types of consultants, followed by several questionnaires to enable you to help organizational agents to find the type of consultant best suited to deal with their issues.

Extra-Pair-of-Hands

An extra-pair-of-hands is an individual who fills a temporary void caused by the redeployment or extended illness of key employees, covers for people who are on vacation, or catches up on backlogs of work that may be caused by cyclical surges in demand for the organization's products.

Some extra-pairs-of-hands--particularly those who are very senior or extremely competent--may be paired with existing employees to serve as models, demonstrating the proper ways to perform specific responsibilities. In this instance, their usefulness ends when permanent employees return from other assignments, sick leave, or vacations, or when they acquire sufficient understanding, skill, and judgment to perform their roles proficiently.

The primary difference between an extra-pair-of-hands and one of the other three consultant types is that these consultants fit into the workforce, accepting routine tasks as assigned. They are supervised and evaluated just as are permanent employees in the same

positions.

Although extra-pairs-of-hands may like to see themselves as "consultants"

or even "management consultants," we believe the terms "temporary employee" or "independent contractor" are more appropriate to reduce confusion, misunderstandings, and inappropriate expectations of persons who are more properly called "consultants."

Training/Educational Specialist

Training/educational specialists assess the training and educational needs of organizational members. If the underlying root causes of critical issues are clearly traced to a lack of knowledge and/or skills that people need to perform current or future responsibilities effectively (Mager & Pipe, 1970), external specialists can design, test, develop, conduct, and/or evaluate the technical and behavioral skill-training programs, educational seminars, and hands-on workshops when internal resources are either not capable or not available to deliver the necessary training or education.

It is disturbing when participants are unable or unwilling to apply their newly acquired information, skills, and knowledge to their workplace settings. The potential benefits of their training or education are lost. More often than not, this disconnect occurs because organizational constraints prevent employees from, or even punish them for, trying to apply their newly learned skills (Fournies, 1988; Mager & Pipe, 1970; Robinson & Robinson, 1995). Such disconnects occur with frustrating frequency.

Participants frequently tell their trainers and seminar or workshop leaders when they think they will encounter obstacles in applying what they learn in their classrooms to their real-life workplaces. Training/educational specialists should not attribute such information to the participants' irrational resistance. Rather, they should take it seriously enough to alert leaders to the existence and effects of this dynamic and, when feasible, help them to consider how to develop some effective corrective or preventive measures (Robinson & Robinson, 1995).

Many training/educational specialists are trained as instructional designers. Many are enhancing their skills by becoming performance consultants (Robinson & Robinson, 1995) and adding OD consulting skills to their skill sets. With such cross-training and job expansion, the distinctions between types of consultants begin to blur.

Technical Expert (Techspert)

Technical experts (techsperts) typically possess in-depth information, knowledge, skill, and experience in their own relatively narrow, highly specialized technical areas. Some examples are lawyers, dentists, physicians, enterprise resource planning (ERP), customer relations management (CRM) software platform specialists, public relations experts, inspirational public speakers, econometric modeling specialists, industrial/organizational psychologists, and, of course, various kinds of both technical and managerial behavior training/educational specialists. Many techsperts develop their specialized skills before becoming consultants; many are generalists who have added marketable consulting skills. Many how-to books have been published to assist them in making these kinds of career shifts (Barcus & Wilkinson, 1995; Bray, 1991; Connor & Davidson, 1985; Greiner & Metzger, 1983; Jones, 1993; Salmon & Rosenblatt, 1995; Tobias, 1990; Tuller, 1992).

Large, complex organizations often employ techsperts on a permanent, full-time basis. A market for external techsperts exists because most client systems do not have sufficient work to keep such narrow-band specialists occupied on a full-time basis. So when a client system must achieve some specific results, external techsperts are hired on a temporary basis.

Techspert services are most appropriate when the issue is nonrecurring and technical or highly specialized. For example, in 1999 a great many techsperts were kept extremely busy helping client systems around the globe to fix their Y2K problems. Today, many European and African firms engage techsperts to help bring their production procedures in line with emerging ISO quality control standards.

The primary function of techsperts is to apply their specialized skills and methods to do the following:

- Analyze problems in order to recommend solutions;
- Implement their own or some other recommended solutions; or
- Both.

When assigned either or both of these functions, techsperts are usually given a relatively free hand from the time they accept the assignment until they present their conclusions and recommendations. After all, the techsperts' arcane competencies are usually not understood well by the client organizations' leaders, managers, and members. So they cannot very well supervise techsperts. Usually, techsperts are terminated once they have delivered their recommendations or completed their assignment.

Techsperts market themselves as "problem solvers" and "solution providers." Therein is a major paradox. The biggest disadvantage in using a techspert is that their elegant technical solutions frequently fail because they lack the active and enthusiastic commitment and support of a critical mass of organizational members. This support is often crucial for proper implementation of the recommendations. Members may feel that the techsperts' solutions were imposed on them in an arbitrary, insensitive manner. Therefore, members may withhold their support and resist the techspert's solutions.

Organization Development (OD) Consultants

Organization development consultants operate on the fundamental assumption that their client system's leaders and members already have the essential technical skills and content information they need to deal with their issues. Therefore, rather than solving client systems' problems, OD consultants strive to work collaboratively with the organization's leaders and members, helping them to identify, clarify, prioritize, and deal with complex organizational issues. Their services are most appropriate when management wants both to achieve a set of specific results and to enhance internal capabilities for dealing effectively with similar issues in the future.

Traditionally, OD consultants are seen as "process" experts, rather than as content experts. However, in those increasingly frequent situations in which client systems require assistance in both content and process, OD consultants are (or should be) partnering with trainer/educators and techsperts in providing integrated, multidisciplinary consultative services.

Because OD consultants are typically skilled in creating opportunities to involve organizational members actively, they are the best choice when the success of the consulting effort depends on those members' commitment to support the action plans. In addition, their highly interactive and didactic methods are essential in transferring their skills and knowledge to organizational members--thus empowering members while reducing their dependency on consultants.

Typical assignments for OD consultants include providing relevant information about current organizational and marketplace trends and issues and assisting client system leaders in the following ways:

- To anticipate unpredicted, emerging implementation issues and deal effectively with planning and implementing complex systemic changes (see, for example, Bennis & Mische, 1997; Champy, 1994, 1995; Cunningham, 1993; Freedman, 1997; Geisler, 1997; Hambrick, Tushman, & Nadler, 1997; Johann, 1995; Jones, 1993; Kanter, Stein, & Jick, 1992; McHugh, Merli, & Wheeler, 1997; Nadler, 1998; Nader & Merten, 1998; Nadler, Shaw, & Walton, 1994; Tenner, 1996; Tichy & Charan, 1998; Tichy & Sherman, 2000; Tushman & O'Reilly, 1996; Walton, 1989).
- To implement changes in an organization's culture, such as transforming from a technocratic or bureaucratic culture to one that is participative, team-based, and customer-oriented (see, for example, Cameron & Quinn, 1997; Davis, 1984; Frost, Moore, Louis, Lundberg, & Martin, 1985; Glidewell, 1989; Hall, 1976; Hofstede, 1984, 1991, 1994; Lawler, 1988; McLagan & Nel, 1995; Meyerson & Martin, 1987; Schein, 1992, 1999; Tichy & Devanna, 1997; Trompenaars, 1994).
- To formulate the creation of an organization's core mission and strategic plans so as to bring all elements and operations of the organization into alignment (see, for example, Ackoff, 1999; Barker, 1992; Coates & Jarratt, 1989; Finkelstein & Hambrick, 1996; Goodstein, Nolan, & Pfeiffer, 1993; Kaplan & Norton, 1996; Labovitz & Rosansky, 1997; Mintzberg, 1994; Montgomery & Porter, 1991; Nanus, 1992; Ohmae, 1990; Parker, 1990; Porter, 1990; Schoemaker, 1995; Scott, Jaffe, & Tobr, 1994; Tichy, 1990; Worley, Ross, & Hitchin, 1995).
- To redesign an organization's structure to enhance its effectiveness, for example, to flatten it, make it laterally oriented, or make it transparent and open to transactions for both internal and external suppliers and customers (see, for example, Ashkenas, Jick, Ulrich, & Paul-Chowdhury, 1999; Bennis & Mische, 1997; Clegg & Birch, 1998; Galbraith, 1977; Jaques, 1989; Miller, 1982; Mohrman, Cohen, & Mohrman, 1995; Mohrman, Galbraith, & Lawler, 1998; Morgan, 1997; Morgan, 1989b; Nadler, Gerstein, Shaw, & Associates, 1992; Nadler & Tushman, 1997; Nohria & Eccles, 1994; Pasmore, 1994; Pasternack & Viscio, 1998).
- To develop a strategy and process for accurately identifying and effectively deploying and utilizing scarce organizational resources (see, for example, Adams & Hansen, 1992; Mohrman, Cohen, & Mohrman, 1995; Pfeffer, 1994a, 1998b; Schuster, Carpenter, & Kane, 1996; Spencer, 1989).
- To improve the level of cooperation and integration or reduce the level of dysfunctional conflicts between interdependent organizational subsystems and across vertical hierarchical levels (see, for example, Brown, 1983; Johnson, 1992; Kernberg, 1998; Labovitz & Rosansky, 1997; Morgan, 1997; Neuhauser, 1990; Parker, 2000; Pascale, 1990; Rothman, 1997).

- To design, install, and utilize mechanisms to accumulate, archive, manage, and disseminate the organization's collective "lessons learned," enabling the enterprise to become a "learning organization." A recent innovation is "action learning," which is a clever integration of action research, organizational learning, and leadership development that calls for a multidisciplinary team of OD consultants and training/educational specialists (see, for example, Argyris, 1993, 1999; Argyris & Schon, 1995; Brown & Duguid, 1991; Dotlich & Noel, 1998; Fiol & Lyles, 1985; Gasparski & Botham, 1998; Huber, 1991; Kline & Saunders, 1993; Marquardt, 1999; Rothwell, 1999; Senge, 1990, 1999; Senge, Roberts, Ross, Smith, & Kleiner, 1994).

- To coach and provide other pertinent developmental experiences for managers who must adapt their behaviors to bring them into alignment with and to support the purposes of their organizations' change initiatives. Action learning is pertinent here, also (see, for example, Argyris, 1993; Bennis, 1998, 1999; Bennis & Goldsmith, 1997; Bennis & Nanus, 1997; Bennis & Townsend, 1995; Black, Gregersen, & Mendenhall, 1992; Block, 1996; Collins, 1995; Collins & Porras, 1994; Goleman, 1998; Hardy & Schwartz, 1996; Kets de Vries, 1984, 1991; Kets de Vries & Miller, 1989; Kilburg, 1996; Levinson, 1994; McKenna, 1997; Merry & Brown, 1990; Miller & Brown, 1984; Morrisey, 1996; Nadler, 1998; Ohmae, 1982; Peterson & Hicks, 1996; Pfeffer, 1994b; Ritvo, Litwin, & Butler, 1995; Rothwell, 1999; Ryan & Oestreich 1991; Shula & Blanchard, 1995; Srivastva, 1983; Srivastva & Cooperrider, 1997; Tichy & Sherman, 2000; Tobias, 1990; Waldman & Atwater, 1998; Weisbord, 1987; Whitmore, 1994; Wind & Main, 1998).

- To deal with the human sides of mergers, acquisitions, and strategic alliances and their aftermath, including restructuring and downsizing, and help-

ing management develop a sense of renewal among surviving employees (see, for example, Astrachan, 1990; Buono & Bowditch, 1989; Cartwright & Cooper, 1999; Clemente & Greenspan, 1998; Feldman & Spratt, 1999; Knowdell, Branstead, & Moravec, 1994; Lajoux, 1998; Marks & Mirvis, 1998; Mirvis & Marks, 1992; Nahavandi & Malekzadeh, 1993; Noer, 1993; Pritchett, Robinson, & Clarkson, 1997).

- To recognize their organizations' core competencies and to design and use knowledge-based organizations (see, for example, Arbnor & Bjerke, 1996; Barchan, 1998; Bushko & Raynor, 1998; Drucker, 1999; Lynn, 1998; Myers, 1996; Sanchez & Heene, 1997; Sarvary, 1999).

- To use a total systems approach to operate and transform their organizations' businesses simultaneously (see, for example, Ackerman-Anderson, 1996; Adams, 1984; Blumenthal & Haspeslagh, 1994; Bridges, 1991; Bunker & Alban, 1997; Davidson, 1996; Davis, Maranville, & Obloj, 1997; Flamholtz & Randle, 1998; Gouillart & Kelly, 1995; Greenwood & Hinings, 1996; Greiner, 1972; Hambrick, Tushman, & Nadler, 1997; Kilmann & Covin, 1988; Lichtenstein, 1995; Mink, Mink, Owen, & Esterhuysen, 1993; Nadler, 1998; Newman & Nollen, 1998; Nolan & Croson, 1994; Nutt & Backoff, 1997; Owen, 1987, 1991; Quinn & Cameron, 1988; Romanelli & Tushman, 1994; Srivastva & Cooperrider, 1990; Weisbord, 1992).

- To learn from the metaphors provided by chaos and complexity theory (see, for example, Brown & Eisenhardt, 1997; Conner, 1998; Gleick, 1987; Masterpasqua & Perna, 1997; Price Waterhouse Change Integration Team, 1996; Sherman & Schultz, 1998; Stacey, 1996; Waldrop, 1992; Wheatley, 1992).

- To convene, deploy, and manage temporary project organizations effectively

(see, for example, Demarco & Lister, 2000; Freedman, 1997, 2000; Lewis, 1998; Nicholas, 1990).

- To appreciate the need to develop effective leadership skills for a post-industrial, global organization operating in a volatile, discontinuous marketplace (see, for example, Bass, 1998; Block, 1988; Cohen & Bradford, 1990; Culbert, 1996; Gabarro, 1987; Kotter, 1996; Morgan, 1989a; Muirhead & Simon, 1998; Nadler, 1998; Nanus, 1992; O'Toole, 1995; Tichy, 1997).
- To enhance the appreciation of organizational agents, managers, and members for the challenges and implications of globalism (see, for example, Barnet & Cavanagh, 1994; Black, Gregersen, & Mendenhall, 1992; Cooperrider & Dutton, 1999; Drucker, 1993; Francesco & Gold, 1997; Hofstede, 1984, 1991, 1994; Huntington, 1996; Miller, 1982; Mohrman, Galbraith, & Lawler, 1998; Moynihan, 1993; Naisbitt, 1994; O'Hara-Devereaux, & Johansen, 1994; Ohmae, 1990; Pucik, Tichy, & Barnett, 1993; Sorensen, et al., 1995; Stein, 1987; Tichy & Devanna, 1997; Tichy, McGill, & St. Clair, 1997; Trompenaars, 1994).
- To understand and apply theory and research appropriately in organizational behavior (see, for example, Bolman & Deal, 1987; Clegg, Hardy, & Nord, 1996; Cohen et al., 1988; Cook, Hunsaker, & Coffey, 1996; de Geus, 1997; Francesco & Gold, 1997; Gibson, Ivancevich, & Donnelly, 1998; Golembiewski, 1993; Greenberg & Baron, 1999; Handy, 1993; Hatch, 1997; Hellriegel, Slocum, & Woodman, 1997; Hersey & Blanchard, 1988; Hesselbein, Beckhard, & Goldsmith, 1998; Hunt, Schermerhorn, & Osborn, 1997; Ivancevich & Matteson, 1995; Johns, 1996; Katz & Kahn, 1990; Kolb, Rubin, & Osland, 1994; Luthans, 1997; Matteson & Ivancevich, 1998; Moorehead & Griffin, 1997; Morgan, 1994; Nahavandi & Malekzadeh, 1998; Natemeyer & Gilberg, 1990; Newstrom & Davis, 1996; Pepall, Norman, & Richards, 1998; Pfeffer, 1998b; Robbins, 1998, 1999; Schermerhorn, Hunt, & Osborn, 1996; Shani & Lau, 1999; Van Maanen, 1998; Woodward, 1994).

Disappointing past experiences that the leaders, managers, and members may have had with people who called themselves "consultants" may have led to so much skepticism that your marketing efforts and the effectiveness of your OD consulting will be adversely affected. Specifically, if executives and managers are used to working with techsperts, they may misunderstand attempts to involve and collaborate with them. For example, they may take proposals to apply OD processes and methods as indications that you (their OD consultant) think they lack competence or that you are attempting to avoid personal responsibility or extend the contract. If management is most familiar with extra-pair-of-hands consulting, they may see OD initiatives to stimulate high levels of participation by all involved parties as irrelevant at best or insubordination at worst. Leaders may confuse OD consultation with training/educational interventions and apply the reasonable but inaccurate expectation that OD consultants should achieve their goals by conducting a series of conveniently scheduled and budgeted workshops or seminars.

The fact that many OD consultants also refer to themselves as "facilitators" may create additional confusion, as many skilled training specialists also refer to themselves as "group facilitators." The major distinction between group facilitator/trainers and OD consultants is that the primary purpose of the former is to conduct classroom exercises with groups of students/participants who are individuals coming from many different, often unrelated, organizational subsystems. Organization development consultants, however, are more likely to work directly with organizational members in their natural work settings or in retreats, enabling members of intact teams to enhance the quality and effectiveness of their real-life meetings. Organization development consultants help team

members to improve their participative problem-solving and decision-making skills so they can deal effectively with their specific team issues. Therefore, they must not only be competent trainers but must also be proficient in enabling team members to apply their skills properly.

The confusion and misunderstanding of the nature of OD consultation is perplexing yet interesting. Organization development is the most theorized, studied, and published of the four types of consultants (see, for example, Anderson, 1999; Argyris, 1990; Argyris, Putnam, & Smith, 1985; Beckhard 1969; Beckhard & Prichard, 1992; Bennis, 1969; Blake & Mouton, 1969; Burke, 1977, 1982, 1993, 1996; Conger, Lawler, & Spreitzer, 1998; Cummings & Worley, 1997; French & Bell, 1995; Golembiewski, 1993; Gouillart & Kelly, 1995; Kilmann, 1989; Lawrence & Lorsch, 1969; Lippitt & Lippitt, 1978; Massarik, 1990, 1993, 1995; Nevis, 1987; Nevis, Lancourt, & Vassallo, 1996; Pauchant & Mitroff, 1992; Rothwell, Sullivan, & McLean, 1995; Schein, 1992; Skibbins, 1974; Steele, 1973; Tannenbaum, Margulies, Massarik, & Associates, 1985). In addition, the field of OD is supported by a number of established journals, for example, the *Journal of Applied Behavioral Science*, the *OD Practitioner*, and the *OD Journal*.

Yet, although we have seen increased organizational awareness, jobs, and business for OD consultants over the past forty years, when we identify ourselves as OD consultants, we still run into blank stares from many prospective leaders and agents. This is disheartening. It indicates that too many agents and leaders are not making informed decisions when recruiting and selecting their consultants. We believe that consumer education is a critical activity for leaders in our field (see Zachrisson & Freedman, 2000).

Which Type of Consultant Is Needed?

We have developed a series of simple questionnaires that you can use to enable agents and leaders to determine which of the four consultant types can best help them to deal with various issues within their organizations. It is important for you to help them to respond to these questionnaires in the sequence in which we present them. The first questionnaire (Exhibit 3.1) will help them determine whether the organization will be best served by an extra-pair-of-hands or by one of the remaining three consultant types. The second (Exhibit 3.2) narrows the choice down by helping them decide whether training/educational specialists are most relevant, or if one of the two remaining consultant types is most appropriate. The last questionnaire (Exhibit 3.3) will help them choose between techsperts or OD consultants.

Multidisciplinary Consulting Teams

The potential benefits of many consultation efforts are often undermined by dysfunctional competitive relationships between consultants of different kinds and types. Even when they work for the same consulting firm, consultants often compete for the same client system's limited time, attention, and budget. This is a counter-productive orientation that is often based on a severely restricted world view. Each type of consultant performs a useful purpose when properly matched with the needs of client system and aligned with one another. We believe that there are powerful but usually unrealized synergies to be achieved through combining the talents of various types of consultants within multidisciplinary consultation teams.

CASE IN POINT

One of the authors was involved in the implementation of a \$150-million, enterprise-wide resource planning software platform system project with a global engineering

company. The project was scheduled for completion in three years and required well over one hundred twenty internal and external consultants. The cadre of consultants was composed of the following:

- Extra-pairs-of-hands were hired as temporary replacements for the eighty permanent employees who were redeployed to the project as content or business experts. The permanent employees were to participate in the project's essential feasibility tests, developing value propositions, design, configuration, integration, data cleansing and transfer, data migration, and implementation (deployment) planning. The extra-pairs-of-hands were to occupy the permanent employees' back-home positions and perform their role responsibilities until their parts in the project were completed.
- Training/educational specialists were brought in to design and supervise the essential technical training for the client organization's people who were to be responsible for operating one of the twelve different modules to be rolled out.
- Techsperts who were brought in included specialists in project management, ERP software and hardware technology, human resource management (recruiting, job descriptions, and compensation and incentives), communications and public relations, project office and facilities management, and project equipment. In addition, many of the client organization's own employees were brought into the project, in part because of their expertise with the company's business processes and the existing "legacy systems" that were to be replaced by the ERP software platform.
- Organization development consultants provided "change management" support. They were to (1) facilitate team development for design teams, the team of design team leaders, and project management teams; (2) facilitate inter-team and inter-group transactions within the project team and between the project group and the end-user subsystems, both nationally and globally; and (3) anticipate and prepare mechanisms and methods to identify and deal with emerging planning, involvement, and implementation issues. β

Matching Consultants with Purpose

When properly matched to an assignment, each of the four consultant types can serve legitimate and useful organizational purposes. However, for you to help agents and leaders create such a match, you must help them to become thoroughly familiar with each of the seven legitimate purposes that might be served by consultants. You must be able to explain or demonstrate how each consultant type is best suited to contribute to the realization of one or more of these seven purposes.

The seven distinct consulting purposes can be arranged in a hierarchical fashion (Turner, 1982). As shown in Figure 3.1., lower-order purposes must be achieved before engaging in efforts to realize the higher-order purposes, because a solid foundation is needed to support the realization of the higher-order purposes.

As an ethical and practical OD consultant, it is in your enlightened self-interest to make sure that agents and leaders have realistic expectations for each of the four types of consultants. Be prepared to discuss which types of consultants are most likely to be able and willing to deliver each of the seven levels of services defined by Turner's pyramid, shown in Figure 3.1 and described in more detail below.

Provide Information

An extra-pair-of-hands is there to do a specific job. These consultants are expected to provide only minimal information--unless, of course, the position that they are temporarily filling involves providing information.

Training/educational specialists can provide information and related skill-development training in their specialized subject areas. They should also help decision makers by clarifying which alternative educational or training methods are most appropriate in a given situation, which content is necessary to best enable leaders and members to deal with their organizational issues.

For techsperts, providing information is one of their two primary functions. They should be able to tell the leaders of their client organizations such things as: "If you want such-and-such result, you will have to buy or build thus-and-such a system" or "If you are getting undesirable consequences or side effects from M and N, then you probably have to add such system elements as X and Y and eliminate element Z."

Techsperts can provide the technical characteristics, attributes, qualities, and requirements for various kinds of process systems (for example, computerized materials management, ERP and CRM software platforms, automated production or manufacturing systems, PR-driven corporate image campaigns, and employee compensation and incentive systems). Some specialized techsperts should be able to provide such information as current economic, political, market, social, demographic, or new technological trends and innovations in their areas of expertise.

Organization development consultants can provide quite a bit of relevant information, for example, about the probable consequences of maintaining the status quo versus changing existing interpersonal, inter-group, and organizational conditions. They can also conduct brief informational seminars for influential opinion leaders on various pertinent topics, such as strategic thinking, transformational leadership during systemic change efforts, the impacts of complex change on organizational dynamics, the human consequences of restructuring, or the predictable nature of resistance to organizational changes.

Provide a Solution

In some cases, the recruiting, screening, deploying, and managing of a cadre of extra-pairs-of-hands may, in itself, be a temporary solution for a purely temporary problem.

Training/educational specialists may claim that they provide training and educational solutions for their client systems' issues. Although this may be valid in some circumstances, we are extremely skeptical when training/educational specialists respond unquestioningly to an agent's description of an issue. For example, if an HR director tells training/educational specialists that there is a "communication problem" in the organization, many will accept that self-

diagnosis and respond too quickly by recommending a communication skills training program as the remedy. The specialist offers the recommendation without taking the time to study the situation for root causes and discover whether the so-called "communications problem" is actually the result of members' lack of skill. It may be the result of unclear roles and vague expectations and/or persistent conflicts between key individuals or groups. These alternative root causes would require interventions other

than--or in addition to--training in communications.

Providing solutions is the techsperts' second primary arena. Their forte is providing solutions in such functional areas as finance, engineering, IT systems, knowledge management, marketing, manufacturing, maintenance, and so forth. Because most of these specialties are undergoing continual change and innovation, leaders can benefit from the in-depth knowledge of a techspert, who can simply install the newest technology or provide turnkey solutions to technical problems. Alternatively, decision makers might ask techsperts for their recommendations. Ideally, there would be three parts to such recommendations: (1) at least three ways to fix the problem; (2) the advantages and disadvantages for each alternative; and (3) the alternative that the techspert believes is most appropriate and effective.

Organization development consultants usually insist on performing their own diagnosis to confirm, elaborate, or challenge the beliefs of the agents or leaders before recommending a process for developing an action plan to deal with the issue. However, some are prepared to make "best guess" recommendations without a diagnosis if the organization is in a crisis and immediate action is required. In emergencies, they "change hats" and take on some aspects of the techspert role (Freedman, 1995).

Conduct a Diagnosis

In our experience, only the extra-pair-of-hands is not actively concerned with conducting a diagnosis. The other three consultant types usually recommend assessment methods to identify and/or clarify the root causes of the issues that they have been asked to help manage. However, there are significant differences among how training/educational specialists, techspert consultants, and OD consultants view the diagnostic process.

Training/educational specialists most often recommend a training needs assessment. For example, if qualified specialists are given the task of delivering a course in "improving delegation skills" in an organization, they should begin by conducting an assessment of the individual members of the target population. They should focus on the prospective participants' current level of knowledge and compare that with their own and others' perceptions of their competence in actually delegating work to others. Unfortunately, some training/educational specialists honestly believe that they already know what skills and competencies must be provided in order to improve any group of employees' skills in their given area of specialization (communications, decision making, delegation, dispute resolution, and the like). Based on this belief, they see no need to conduct what seems to them to be a redundant assessment. Such arrogance may lead to a major error. The specialists' models for appropriate and effective skills may be incompatible with the culture of their trainees' organization. If so, the trainees are unlikely to apply their newly acquired skills if they are perceived to be competitive with traditional cultural norms that define the limits of acceptable behavior and practices.

Techspert consultants tend to limit the scope of their in-depth diagnoses to their own specific areas of expertise. Depending on their specialties, they may focus exclusively on a single organizational subsystem, for example, research and development, or on their specialized function as it threads its way along their client systems' delivery chains. That is, they act as if the targets of their diagnostic studies are isolated parts of the larger system. Thus, whatever occurs within the targeted department, function, group, system, process, or region is treated as if it will not impact other operational parts of the larger organization. As a result, organizational members--who usually know better--may disagree with or resist the techspert's diagnostic process, conclusions, and

recommendations.

Organization development consultants treat the diagnostic process, in itself, as an intervention. They realize that, more likely than not, the act of searching for and gathering information sends a message and triggers a "ripple effect" throughout the client system's interdependent levels and subsystems. They anticipate that diagnostic interventions evoke a wide range of reactions from subsystem members. They also know that imposed diagnoses and derivative recommendations are usually resented, rejected, and resisted. So they design ways to involve intact work units and key individuals who will be affected by the execution of any implementation plans. They know that "buy in" or a sense of ownership of the diagnosis and conclusions is critical to assure that people will support plans to change the organization. They also take the mystery out of the diagnostic process by making it as transparent as possible by describing the entire process and explaining why they do what they do at each step.

Develop Recommendations

Extra-pairs-of-hands seldom make recommendations unless it is part of the role responsibilities that are inherent in the temporary positions that they fill.

Training/educational specialists often provide recommendations on the basis of their training needs assessments. Only recently, some training/educational specialists have begun to acknowledge that they must consider what happens when well-trained former participants return from the classroom to their respective workplaces. Far too often, the newly acquired information, knowledge, and behavioral skills are not applied, so a few training/educational specialists have begun to experiment by following their ex-participants into the workplace to conduct situational analyses. As mentioned earlier, they often discover powerful cultural forces being exerted by colleagues and supervisors that prevent ex-participants from applying what they have learned. In addition, they often discover that ex-participants would have to violate prevailing contradictory policies and practices in order to use what they have learned. We have had several experiences in which training/educational specialists recommended that OD consultants be brought in to help leaders deal with these formal and informal impediments to change.

Recommendations, supported by their findings and conclusions, are frequently the primary content of techsperts' final reports. These recommendations may include specific implementation plans, as well as instructions for how to execute those plans.

Organization development consultants are not likely to offer recommendations for what should be changed (the content). Rather, their recommendations typically focus on how organizational members might take the next steps (the process) that might be taken in developing solutions. Their usual approach is to organize the raw data that they collect to prepare for two or more data feedback meetings, first with the leaders, then with managers, and then, possibly, with members. During these meetings, OD consultants typically help the leaders do the following:

- Review and accept (or challenge) the data and the categories;
- Derive conclusions from the organized data;
- Acknowledge and specify the issues about which they are concerned;
- Explicate the criteria on which they will determine the relative importance of

each of these issues;

- Use these criteria to establish priorities;
- Set change goals for the high-priority issues; and
- Develop implementation or action plans (which they may see as "solutions") to achieve the goals.

Organization development consultants know that this process is essential in creating compelling, meaningful opportunities for the leaders and members to cooperate in generating their own goals and action plans. As a result, leaders and members develop a shared sense of ownership of the results and are more likely to commit themselves to supporting the execution of those plans.

Implement Solutions

Extra-pairs-of-hands are often essential resources in implementing complex systems changes, especially when permanent employees are overloaded. Extra-pairs-of-hands can relieve the pressure by taking on and working off the overload. Some may execute selected parts of the implementation plan, leaving permanent employees to perform their routine jobs undisturbed. However, although this approach seems to be logical and expedient, there is a possible significant downside. Because permanent employees will not have had to sacrifice or invest extra time and energy in the implementation, they may not understand or accept the changes and will not develop a sense of ownership. Therefore, they may resist and withhold their support or not make proper use of the changes.

Many complex change efforts require leaders and members to acquire competence in applying new information, knowledge, and/or technical or behavioral skills. The most expedient approach often seems to be some sort of classroom-based education or technical and behavioral training. However, as we have pointed out, there may be formal and/or informal impediments to applying these kinds of learnings in their real-life workplaces. So training/educational specialists may also have to involve themselves during the implementation phase. However, we believe they should collaborate with OD consultants, who can serve as coaches to help newly trained leaders recognize and deal with the impediments and apply what they have learned. Organization development consultants can also help specify and deal with cultural and structural impediments.

Many techspert consultants consider their responsibilities to be fulfilled once they have submitted their conclusions and recommendations. The most frequent exception is when the solutions are so specialized that they require the techsperts' continued leadership and guidance during the implementation. For example, an organization may engage techsperts to design and install a CRM software system. In such cases, techsperts are not just involved in the implementation; more often than not, they are given the critical roles of project leaders and primary implementers.

Organization development consultants should be actively involved in the execution of implementation plans. However, their relevance is frequently overlooked until the change initiative runs into difficulty. To the extent that they are able to influence the scope and focus of their involvement, OD consultants abide by Saul Alinsky's Iron Law (1969, 1972): "Don't ever do nothing for nobody that they can do for themselves" (our paraphrase). That is, OD consultants should take on responsibilities to solve problems or

make decisions only when organizational leaders and members lack the knowledge and skills they need to ensure the successful implementation of the planned changes. At times, they may function as techsperts; perhaps if they are also qualified clinical psychologists, they may recognize and deal with the occasional psychological crises that are precipitated by radical changes in organizations (Freedman & Levinson, 1998).

More frequently, OD consultants help leaders and members to acquire the skills for managing complex systems change that they will need in the future. This is a four-phase process, the first three of which are guiding, escorting, and following (Freedman, 1982). Organization development consultants may guide inexperienced project managers by modeling and explaining how to engage relevant stakeholders in joint issue identification, goal setting, problem analysis, aligning project goals with organizational missions and business plans, and action planning. Then, as project managers learn to perform such functions, OD consultants shift into escort roles as partners so that project managers gain essential hands-on practice in using the skills being modeled. As project managers increase their proficiencies further, OD consultants shift roles again, pulling back to serve as followers, that is, coaching and preparing project managers to perform some specific function, observing them, and debriefing and providing feedback. To do otherwise would be to deny organizational leaders and members important opportunities to learn to rely on themselves. At this point, OD consultants shift their roles for the fourth time: They get out!

Build Consensus and Commitment

For obvious reasons, extra-pairs-of-hands cannot be expected to aid in this function. Training/educational specialists may perform this function by inducing their seminar and workshop participants to commit themselves to applying what they have learned in the classroom to their respective real-life work situations. As we have discussed, this commitment may be naïve unless learners are members of intact work teams and the commitment is based on realistic assessments of the informal social pressure and formal structure and policies with which ex-participants will have to contend.

Techsperts seldom become involved in building consensus among those who must use or will be affected by their solutions. Nor do they ordinarily seek commitment to the solutions that they have recommended. They seem to assume that the elegance of the technical results of their work will be sufficiently compelling to win people over. They also seem to assume that once their technical innovations are installed, organizational members will have no choice other than to comply and adapt.

For OD consultants, building commitment is a primary process competency. They must be capable of designing a variety of engaging, relevant methods and processes to induce all involved parties to participate in the activities that are essential to moving the system forward with organizational change efforts. Active involvement and participation in pertinent problem-solving and decision-making processes will evoke commitment to supporting the decisions made and actions taken to achieve complex systems change.

Facilitate Continuous Learning

Arguably, only OD consultants and, to a lesser degree, training/educational specialists see this as an essential part of their jobs. Training/educational specialists often contribute to the kinds of continuous learning that OD consultants believe are most relevant by training managers in the use of participatory and strategic management philosophies, concepts, methods, and skills. Unfortunately, many specialists try to do precisely what OD consultants try to avoid. Acting as experts, they train organizational leaders and

members to use specific solutions for particular situations, but often do not teach them how to learn from their own experiences. Only if they provide systems or mechanisms that further leaders and members to create knowledge and competencies by themselves can they perform this function.

One of the explicit functions of OD consultants, in fact, one of the defining purposes of our discipline, is enabling leaders, managers, and members to acquire sufficient competence, confidence, and comfort to learn enough from their collective experience to deal with similar issues, on their own, in the future. Organization development consultants actively encourage leaders and members to take the strategic view. They stand ready to assist in any efforts that contribute to their client systems' vitality and resilience in the face of continuous, volatile change and increasing complexity. In addition, they encourage leaders to make sure that their internal and external environments are continuously scanned for unprecedented events and circumstances with which they will have to cope or to which they will have to adjust--or anything that offers unexpected opportunities.

Table 3.2 summarizes our discussion of how each of the four types of consultants ideally contributes to each of Turner's seven consulting purposes (seen in Figure 3.1).

We believe that the lower levels of the hierarchy represent the "traditional" purposes of most types of consulting. It is these levels to which consultants dedicate most of their time and energy. The effects of the first five levels, by themselves, are temporary and frequently disappointing. It is only recently that building consensus and commitment and facilitating continuous learning have begun to be accepted as legitimate and essential consultative purposes. This is in sharp contrast to some critics' past beliefs that they were "unnecessary fluff."

Early in their careers, many older OD consultants were training/educational specialists and, in that capacity, served important supportive roles in organizational change efforts. Organization development consultants still endeavor to design

and deliver high-quality training and education as part of a comprehensive set of interventions.

We have found Turner's hierarchy to be invaluable in our discussions with agents of prospective client systems in clarifying desired outcomes, discussing and negotiating the scope of prospective consultations, and making informed decisions about the substance of the contracts we negotiate. In particular, the hierarchy suggests the work for which leaders and members will assume responsibility after you leave.

Summary

We have described each of four different types of consultants whose specialized services your client systems may need. You may need to educate agents and leaders so they understand the capabilities and limitations of the various types of consultants. You can use any or all of the three questionnaires that we designed to help them to determine optimal matches between their organizations' needs and the respective strengths of various types of consultants.

We encourage you to consider the potential synergies that can be harvested by developing multidisciplinary consulting teams, in contrast with the prevailing, implicit model of the stand-alone consultant that, we believe, will result in the isolation of

"independent" OD consultants and their replacement by the "change management specialists."

The task of matching different types of consultants with the seven purposes of consultation reveals that each is capable of serving some, but not all of these purposes. It also supports the argument favoring multidisciplinary consulting teams.

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