Clients often want to engage consultants for a particular activity like facilitating a Board meeting or strategic planning. How do we help initiate a "transformational" approach to getting results, rather than contracting for an activity?

Selling the Work

Our work typically comes to us by:

1. a potential client contacting us to talk about a possible engagement
2. receiving a Request for Proposal
3. a third party – intermediary, funder or another consultant – approaching us on behalf of a client

Next follows a process of engaging with a potential client to test for the fit between what they need and what you have to offer. Sometimes this is called "selling."

Here's the secret of selling your work:
DON'T SELL YOUR WORK!

The frames that most of us carry around selling put us in the wrong relationship. They tend to trigger experiences of applying for college, trying to make the team, competing for something others have that we want. It can be especially easy to fall into this frame when it's a "prestigious" client or someone we really want to work with. It's even more compelling when we really need the work and the income.

However, trying to "sell" yourself while acting from these mindsets is not the best way to build a successful career and get lots of great work. In consulting, our work ultimately grows the more we deliver great outcomes to clients and the word of mouth and reputation that follow.

Here's how to "sell" by not selling:

1. **Come from purpose**
It's the same medicine we offer our clients in transformational work. *Be the change!* The power that comes from connecting to your own purpose inspires you to show up in your fullness, beauty, and strength. You are more present. Your energy inspires the potential client. You can access your inner wisdom. You also can *enjoy* the engagement process (vs. running anxiety about whether or not they like you and if you will get the gig).

2. **Deep listening**
One of the greatest gifts we can give another person is to offer them an experience of deep, empathic listening. It is experienced as respect, appreciation, presence, kindness, etc. Getting caught up in presenting ourselves or trying to make a "good

impression" gets in the way of that basic human connection that is so fundamental to all transformational work.

3. **Create value**
   Actually <u>do</u> the work. Engage in an authentic way with the client. Think of interviews as a time to give your gifts as a change agent freely and fully. Even if you should not end up closing a contract, see how well you can serve them in even one encounter. This gives them a full and honest experience of you at your best, and what you have to offer.

4. **Don't be an interviewee**
   Don't assume the role of supplicant. You are interviewing each other. It's like a first date. You're both seeking to see if this has the potential to be a mutually fulfilling and fruitful partnership.

   If this is going to be a successful transformational engagement, you need to test using your own criteria to see if this is a client you want to work with. I always give some very direct feedback as part of an initial engagement meeting, just as I would in a coaching session. Are they open to their own learning as a leader (which is rather critical to a successful change process)? How's the chemistry – that hard-to-define natural meeting of energies?

   I often ask them at the end of our time, *"What was your experience of me and our time together? What will you say to your colleagues when they ask you how our meeting went?"* I try to create a space for honest, authentic relationship – to see what's possible between us.

   As consultants, we want to develop relational flexibility so we can increasingly work with a greater range of styles, but here are two questions you might ask yourself in evaluating a potential client:

   1. Do I trust this person? Have they been authentic in our time together? Am I having that gut sense when something feels off?

   2. Will I be able to love them? Our love for our clients is one of the most potent elements of transformation. For whatever reason, we just don't connect with some people. They might be better served by someone else who more instinctively "gets" them.

5. **Serve them**
   In every way, serve the client. This sometimes may extend to determining that a consultant other than yourself might better serve their needs. Your willingness to put the client first may sometimes lose you a particular gig, but your dedication to clients is what will create a successful and satisfying practice and career.

Focus on Outcomes Rather than Activities

Clients often come to us wanting facilitation for an event, such as a staff retreat, a Board or coalition meeting. As change agents, we can find ourselves feeling responsible for the success of an event, yet limited in our ability to deliver. Perhaps:

- The event is already designed and we're being asked to facilitate a flawed agenda.
- The event may not be designed, but a number of unhelpful elements are already set in place (e.g., the program is filled with too many talking heads to whom commitments have already been made).
- It's too short to accomplish its goals.
- The entire event is not well-conceived or positioned to produce lasting results.
- From the outset you see dynamics or factors at play that you believe will limit what's possible, but seem to be outside the boundary of your contract.

Your job in the engagement process is to shift the conversation from events to <u>purpose</u> and <u>outcomes</u>. A great way to do this is to introduce the POP model to the client.

Purpose

Outcome

Process

Before undertaking any activity, one clarifies:

What is the **P**urpose of this activity? **(P)**

What are the specific **O**utcomes we hope to achieve? **(O)**

And only then, what **P**rocess will we use to achieve these outcomes? **(P)**

Perhaps the request is to facilitate a Board meeting. But why? What is the purpose? Is it just a routine Board meeting, or is there a particular challenge or problem to be met? Is it:

- a lack of alignment on vision among the Board members?
- one or more unruly Board members they want help controlling?
- confusion about the appropriate role of the Board?
- tension between the Board and the ED or senior management?
- an important issue on which the Board is divided?

What are the specific outcomes the client hopes to achieve from engaging a consultant? For example:

- Agreement on a particular issue
- Resolution of tension between Board and senior staff
- Alignment on the respective roles of Board and ED
- More effective process for planning and executing Board meetings
- A new Board committee structure

Clients are often focused on activities or events due to lack of experience and training in organizational change. Leaders are usually quite willing to engage with you in a discussion of the real outcomes they would like to see. Our position should be: we're here to deliver results and make sure their resources are well spent. This will almost always be greatly appreciated by any client and help open their minds to alternative approaches we may offer to achieving those results. (It will also help alleviate any possible concern that we're simply trying to expand the scope of work to sell more business).

Use the Wheel of Change

Help educate the client as to what's needed to create enduring change of any scope. The Wheel of Change is a tool designed to help plan transformation at any scale – even the most seemingly small and straightforward organizational change projects. Introducing the Wheel of Change is not intended to overwhelm clients by turning every request into a major organizational transformation project. Rather, the Wheel of Change helps ensure that we attend to the critical variables in the organization that might make or break any change process.

In an initial meeting, you might consider using basic Wheel of Change concepts as a way to engage the client in thinking about the presenting problem from a systems perspective. What does the client see as key success factors when they put on the lens of Hearts & Minds, Behavior, and Structure?

When Not to Compromise

You need to be clear in your own assessment of what's required to actually deliver the outcomes requested by the client. If the client pushes back on the scope of work, keep referring back to the outcomes they want. If the client wants to commit less organizational time and/or money, it's your job as the expert in organizational change to then help them either:

- scale back the outcomes (at least for this phase of work), or
- commit the resources needed to accomplish their goals

Be completely committed to ensuring that the resources to be invested are adequate to the intended outcomes. This stand is not a sale pitch for more work – it's about professionalism and integrity.

Dating

Remember that engaging a consultant requires a lot of trust.

- Leaders are relying on a person they don't know to help address critical organizational issues.
- Leaders – who on a daily basis feel they have to show up as "in control" and confident – are suddenly in the position of being expected to be personally transparent and vulnerable.
- There is a significant commitment of organizational resources.
- Failed change efforts have consequences: erosion of organizational confidence and trust in their leadership, etc.

Even after several interviews and checking your references, before betting the ranch on a major contract, a client may reasonably want to test your competence and the chemistry by engaging in a limited piece of work. I typically advise leaders to do this, and I often suggest it to my own prospective clients. It can be reassuring to clients that you are willing to risk a longer engagement based on your success in the first phase. Our commitment to doing work that really makes a difference in achieving mutually agreed-upon outcomes keeps our interests aligned with our clients. This is a good basis for trust and partnership.

Examples of limited engagements:

- Do some individual coaching of the key leader to help prepare them for change.
- Work with a few key leaders to define and outline the change process.
- Do an assessment – interviews and/or survey – and deliver a report and recommendations.
- Break down a potentially large project into discrete phases, like a remodel project that might be done one room at a time.

Data gathering

As you well know, we cannot count on a leader's sense of what's really going on in their organization. They have an important perspective, but top leaders receive filtered information from their staff. They may be unaware of factors that could have a significant impact on the success of the engagement. Leaders often lack a systems approach to organizational development and may fail to identify the key levers for the changes they want. They may fail to recognize ways in which they themselves may be contributing to the problem they want to solve. Often what leaders think they want may not actually be what they need. For example:

- A common request is for strategic planning. But, there is often a lack of alignment around mission, major issues regarding leadership, or barriers such as a lack of open communication that stand squarely in the way of successful planning.
- The ED wants a consultant to mediate between two department heads that keep coming into conflict. But, what looks like an interpersonal conflict is actually caused by the divergent mandates under which they are operating and lack of

mission alignment at the Board level. Clearing sessions with the two department heads won't produce lasting results.

Even for relatively limited engagements, you should always build in some kind of data gathering to create a firm foundation for your intervention. You need a clear picture of what's going on. But it's also important to give you and the client a shared picture of current reality. Your clients may disagree on your opinion of what's needed, but looking together at real data creates a common basis for aligning perceptions and theories of change for how to proceed. If clients balk at data gathering, help them to see this not merely as prep for the change process, but an invaluable opportunity for them to see what's going on in their own organization.

Some Challenges

1. Finances

Money and costs are, of course, a major concern for non-profit clients. In addition to the usual struggles with limited resources, it can be especially challenging to get funding for organizational development. We need to balance our stand on adequate resources for the desired results with bringing our full commitment and creativity to help our clients get more results for less money.

In addition to money, there are other legitimate constraints clients may face.

These include:

- The person you're speaking with is not the sole decision-maker, and key stakeholders (other senior leaders, the Board, etc.) are not fully on board.
- There is resistance from staff that needs to be addressed rather than pushed through.
- There is a lack of organizational bandwidth – pressing programmatic priorities, lack of staff capacity, etc.

Your job: Start doing what you know how to do. Consult. Now. Even before you've agreed to work together or signed a contract. Isn't this what we do for our clients? Help them overcome obstacles and perceived limitations? Challenge beliefs about what's possible? Find creative solutions? Use the contracting sessions to help them address the problems that are in the way of creating the right conditions to initiate change.

2. Unclear Scope of Work

Very often in larger projects, it's unclear at the beginning what will be actually required to deliver the results. The client may want to know what it will cost, but it can be hard to tell at the onset.

The work often needs a phased approach. Contract for a first phase which, while delivering some substantive results on its own, will help to determine what's going to be required to deliver the full results. Use your experience. You might offer a menu of options from which they will later choose, depending on what you discover in Phase I. It might be helpful to sketch out a range of possible costs for later phases.

Transformation is by its nature an emergent phenomenon, and it must be made clear to those embarking on this journey that we must plan (as best we can) for the unplanned.

3. **Our constraints**

Financial pressures:

Sometimes the proposed piece of work is so ill-considered that the likely success of our engagement is seriously compromised. We can best negotiate for the minimum needed requirements when we're ready to walk should we assess that conditions are not in place for success. However, as consultants we depend on contracts for our livelihood, and we may feel pressure to take what's presented depending on our current contracts and work in the pipeline.

Structural constraints

We may not have the capacity to deliver what the client needs. For example:

- Overall bandwidth: can we meet the scope of client needs?
- Particular nature of client needs: how does our sense of what will be required fit with our existing commitments (e.g. large blocks of time for retreats, ongoing weekly work, etc.)
- Timing of client needs: when do they need to start?
- Travel constraints on our end

Our own emotional attachments:

We want to be willing to go to the mat to stand for what we believe is needed to meet client outcomes. But, we also want to be aware of our possible ego attachment to the way we do things.

- Attachment to our point of view.
- "What? Me, stubborn? But this is my area of expertise. Why don't they understand that I'm right?"
- Attachment to a standard of perfection.
- We are artists of our craft. We want it to be great. But, sometimes we really want to build a Porsche while the client only wants a four-cylinder Kia. It's easy to get a bit too focused on the contract we would like to deliver, but that may be beyond the actual desires of the client.
- Anxiety about not delivering.
- Sometimes our pushing for more control over the process may be driven by a fear of failure. Yes, we do want to set the stage for a successful intervention. But meanwhile, our Progressive non-profit clients almost always have to make do with less than they would ideally like. While being attentive to critical success factors, sometimes we may need to work in conditions of the same limitations that our clients experience every day.

The Contract

Depending on how the dating goes, you may now be ready to "go steady." Assuming you're both feeling good with the relationship, and there is general agreement on what you would do for them, it's time to turn this into a written contract.

Important! You <u>always</u> want a written agreement, which contains at a minimum:

- the scope of work
- exact deliverables: the clearly stated outcomes by which your success will be measured
- time frames for the work
- what you're responsible for providing
- what the client is responsible for providing (don't forget this)
- compensation (including expenses)
- timing of payment of fees
- rights to materials provided or created for the engagement

The client will sometimes want additional provisions regarding confidentiality or items particular to the nature of their work or this engagement.

The contract can be informal and does not have to be in legal language. But, you always want it in writing to prevent any misunderstandings.

Imagine that the person you've contracted with suddenly leaves the organization, and nobody there knows what you agreed to. What would you want to be completely clear to the new person you have to work with?

In Conclusion

Transformational work is emergent, so everything described here should be considered guidelines rather than rules. Each engagement is unique. There is no substitute for being present in the moment. If we are awake and attentive, the client and life will teach us what we need to know and do to help evoke transformation.

