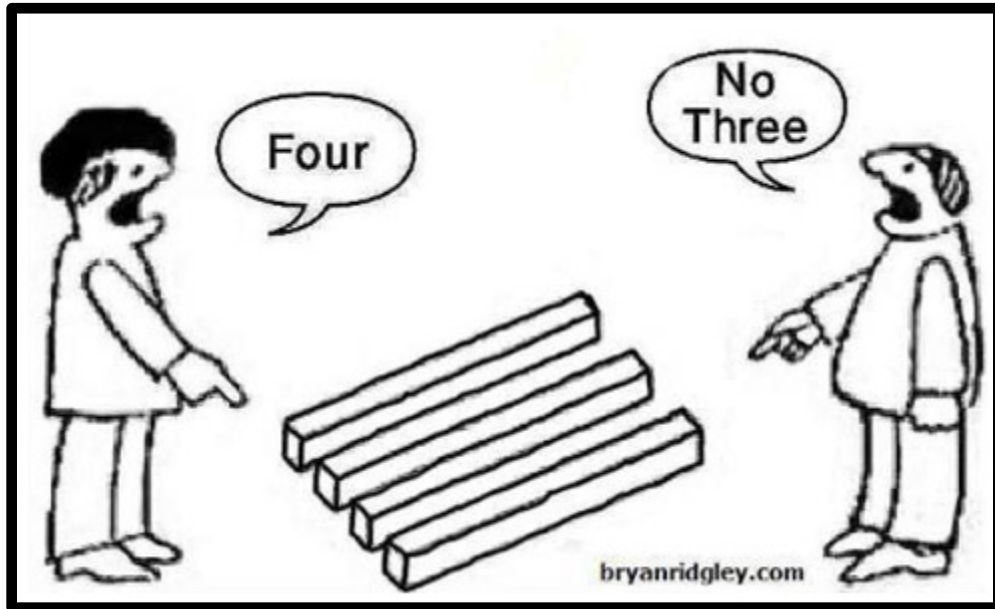


Being Right Is Not the Point



Lessons from 20 years of management consulting

by Mark Schacter

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Author's note

A couple of months after publishing the first version of this paper, an experience with a client reminded me of an important lesson I had forgotten to include. I have inserted "Trust the process" as Lesson 3. There are now ten lessons; the earlier paper had nine. The rest of the text remains the same apart from minor edits.

Introduction

This is a synopsis of what I have learned during 20 years of management consulting.

Most of my clients are public sector organizations: Canadian federal government departments, Canadian provincial and territorial departments and ministries, and multilateral organizations. I have provided advice and training in areas at the core of public management: performance measurement, program evaluation, risk assessment and strategy development.

The lessons I have learned are inseparable from the type of consulting I do. The work of a consulting engineer, for example, or a financial services sector consultant, is different in important respects from my work as a public-sector management consultant. These lessons may have relevance beyond my field but I make no claims about that.

Although public management consultants may find this paper interesting, my intended audience is the public servants who are their clients. Management consultants, thanks to the nature of their work, are highly motivated to understand the public service and public servants. Public servants, on the other hand, have no correspondingly strong incentive to try to understand management consultants. The client/consultant relationship works best when founded in mutual understanding. I hope this paper will contribute to that end by helping public servants see their world through the eyes of an experienced consultant.

Lesson 1 – Don't put the consultant in charge.

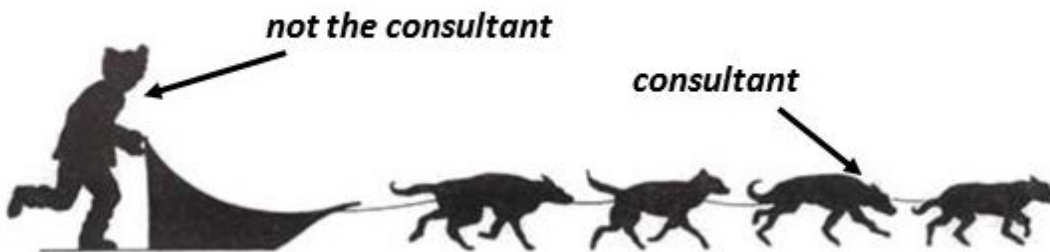
It must be tempting for a manager to think, "The consultant will take care of it. I can move on to something else." The "leave it to the consultant" approach may indeed be suitable in cases where problems are highly technical, and there is a "right answer" that can be found by an external expert with appropriate specialized knowledge. For example, a building owner worried about dampness hires a consulting engineer to find the cause and propose a solution. A financial services company hires a consultant with expertise in regulatory compliance to assess vulnerabilities and develop a plan to ensure compliance. In these situations the client has neither the skill or the knowledge to add significant value.

My work in public management usually involves problems that are neither highly technical nor amenable to definitive "right answers". Take the case of performance measurement. Yes, there is a technical side to creating performance measures for a program. A consultant can tell the client that a measure is good or bad in terms of capacity to generate useful

information. But development of a good performance measurement framework depends on analytical work that precedes creation of performance measures. Agreement has to be reached on the intended social or economic outcomes of the program in question and on the best way to shape the program’s “performance story”. There are no objectively correct answers to be discovered through application of expert professional skill. Answers will be found, instead, through discussion and debate leading to consensus. Program staff themselves possess much of the required knowledge.

I work in areas where it is important that the client “owns” (feels personally invested in) the

Figure 1



solution. The greater the need to work through complexity and ambiguity, the more that ownership matters. Consider preparation of a strategic plan. It involves projecting diverse issues and assumptions onto an unknowable future – a task rife with ambiguity and complexity. Doing it well requires a high level of involvement of the management team. For the plan to be regarded as relevant enough to be used as a basis for decision-making (rather than quickly forgotten), it is essential that the organization’s managers see their own hard work and insights in the finished product. They need to believe it is *their* strategic plan, not the consultant’s. (Note the contrasting case of the consulting engineer’s report – a purely technical task. There would be no need for the organization to feel a sense of ownership over that report for it to be useful.)

“Let the consultant do it” is a tempting idea because it is expedient. The alternative – full engagement of the management team – may lead to protracted and difficult (albeit necessary) discussions. A skilled consultant working on his own will quickly produce a technically sound, professional-looking product. Management will have its deliverable with minimal fuss. But it is likely that the product will have no impact because it will be seen as “the consultant’s report”.

The most satisfying consulting assignments – where I felt I delivered the highest possible level of value to the client – were ones where the client was firmly in charge. How then is the consultant to add value if he is not supposed to be in charge? I address this point under the next lesson.¹

Lesson 2 – Consultants have answers – but not the most important ones.

This is not so much a separate lesson as an elaboration on the previous one, but is important enough to merit its own headline.

Figure 2 – An Expert



A consultant is supposed to be an expert in his field, and experts are supposed to have definitive answers to clients' questions. This expectation, though it may sound reasonable, is valid only under certain circumstances. There is a distinction between the consultant's role as authority figure and his role as source of advice and support. It is only in the former role that the consultant is a provider of definitive "right answers". As situations in an assignment change, it may become appropriate for the consultant to move from authority-figure to adviser/supporter and back again. Both client and consultant must understand when each role is appropriate.

It is inappropriate for the consultant to assume the role of authority figure in relation to questions like "What should be the top five issues in our strategic plan?" or "What are the top five risks that should be in our risk management plan?" or "What are the five best performance measures we could have for our program?" A skilled, experienced consultant who is sufficiently familiar with the organization *could* provide good answers to these questions, but he would be doing the client a disservice. The consultant would have seized ownership (see Lesson 1) of what should have been the client's problem. Once the client's ownership has been undermined it is virtually certain – no matter how technically strong the consultant's work might be – that the strategic plan or risk assessment or performance measurement (or whatever product may be at stake) will never have significant operational value.

¹ Neither this lesson nor Lesson 2 are relevant to cases where the consultant is explicitly asked to provide an independent analysis of a situation.

A recent assignment with a Canadian government client involving development of a corporate strategic plan was an example of playing the dual roles of authority figure and adviser/supporter. My primary value-added was in creating a process that would allow the executive team to reach consensus on the content of the strategic plan. I expressed definitive views (“do it this way, not that way”) on how the preparatory work should be done, how questions should be framed and discussions conducted, etc. This was the domain where the client rightly expected me to lead and be authoritative.

On the other hand, it was not my role to tell the client what the contents of the strategic plan should be. But the client was interested in my views on the subject; it would not have made sense to censor myself. The difference is that while I spoke to matters of *process* as the authority figure, I addressed *substantive* issues on content of the strategic plan as an adviser. In the area where I was the acknowledged authority figure it was understood that my views would carry more weight than anyone else’s. On questions where I spoke as an adviser, I was just another voice around the table; I spoke as a participant rather than a leader.

There are many cases where the consultant’s role will be clear from the start, and will not vary over the course of an assignment. But the most complex and interesting assignments are often ones where the consultant’s role shifts as the work progresses. One week (or day, or moment) he is the authority figure; the next week (or day, or moment) he is an adviser. The consultant’s professional judgement – rather than explicit direction from the client – will tell him when to play which role.

A difficult situation for the consultant is when the client asks him to play a role he believes is inappropriate, as when a client says “we want you to write our strategic plan for us”. In this case I will try to persuade the client that casting me in this role would be ill-advised.

Lesson 3 – Trust the process.

A consultant’s clients, like most people, occasionally contradict themselves. One familiar pattern of self-contradiction goes like this:

- The client observes a management problem. He hires a consultant to analyze it and recommend a solution.
- The consultant does his analysis. The client says it makes perfect sense.

- The analysis implies that the client's Department should adopt a new approach – let's call it 'X'.
- The client initially likes the idea of approach 'X'; after all, it follows logically from the consultant's analysis.
- After further thought the client says, "If we adopt approach 'X', it will become obvious that activity 'Y', which the Department has been doing for years, is counterproductive. But management is comfortable with activity "Y", so I am worried about adopting the approach.

Both the client and the consultant agree the Department would be better off adopting 'X' and getting rid of 'Y'. But anxiety over consequences of change also make the client want to *preserve* something – activity 'Y' – that is part of the problem he asked the consultant to solve!

I have encountered this scenario more than once. For example, a client hired me to help rethink an organizational performance report prepared for the senior management committee. The committee complained that the report was useless because it contained too much quantitative data and too little information. After reviewing the report I concluded, given the nature of the organization's work, that there were few quantitative performance measures that would be meaningful to the senior management committee. I suggested redesigning the report – and the process of preparing it – so that it would include far fewer quantitative measures and more narrative, analytical input from staff. I could not, at the initial stage, say exactly what the new report would look like or how it would be prepared, but I felt I had outlined an approach worth pursuing.

The client team accepted my analysis. But two or three people, including the most senior member of the team, were bothered by not having a clear picture of the end-product. Faced with ambiguity, they reverted to preference for the familiar. "The senior management committee will be disappointed if the report does not contain a lot of numbers. That is what they are expecting," was the gist of their argument.

I reminded them that an excess of numbers had caused the problem that motivated them to hire a consultant in the first place! The committee's strong dissatisfaction with the report gave us license to try something different – what was there to lose? – rather than present a reshuffled version of a losing formula.

Common sense says that analysis of the problem should determine the solution. The client wanted to turn this upside down by taking a fixed idea of what the end product should look like – a report with lots of numbers in tables – and let *it* determine the solution. This is the sort of situation referred to by the old expression about “the tail wagging the dog”.



Figure 3 – Tail wagging the dog: bad idea

Analyze first, and let the results guide you toward a solution. Trust the process. *Do not be disturbed by the fact that a detailed solution may not be obvious immediately.* If you agree with the analysis and the direction it implies, then the best course is to move in that direction and see where you end up. Over and over again I have seen how viable solutions eventually emerge when the up-front thought process is sound and the client has the confidence and discipline to go where it leads.

This approach requires tolerance for ambiguity – something that cuts against the grain of a public sector management style that may favor “critical path analysis”, detailed projections of budgetary and human-resource requirements, etc. The consultant has a critical role to play in reassuring clients that adhering to a thought process without knowing at the beginning what solution will emerge is an appropriate way to address complex problems.

Lesson 4 – Complicated is easy; simple is hard.

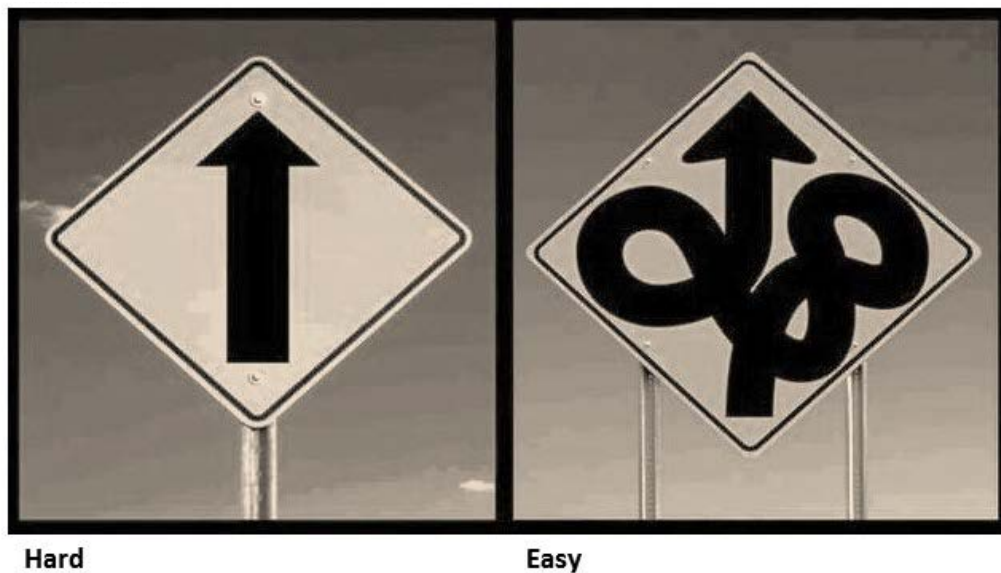
An important part of my job is to help clients cut through the clutter of overly detailed documents and convoluted ideas so that they can get to heart of whatever it is they are trying to accomplish. This is an important function because of the bias in the public service toward making things more complicated than they need to be.

People reading this will be familiar with – perhaps some have participated in writing – the strategic plan with too many “strategic” actions; the performance measurement framework

with too many performance indicators; the briefing note that takes 1000 words to say what could be well said with 100.

The complicated strategic plan (or performance measurement framework, etc.) is worthless. Too detailed to serve as a guide to management decision-making, it is forgotten the moment final approval is obtained. The verbose briefing note causes frustration; the reader (a busy executive) just wants to “get to the point”. Everyone recognizes these problems and yet the unhelpful documents continue to be produced. Why? Because complication is often the path of least resistance, while simplicity is hard. I see three features of the public service environment that drive this: i) aversion to clarity; ii) aversion to disagreement; iii) insufficient attention to good writing.

Figure 4



Aversion to clarity

A planning document published by Public Services and Procurement Canada describes one of its multi-year priorities in the following terms:

Advance workplace improvements by applying the space standards modernization and space recapture initiatives, updating workspaces and enabling new technologies, as appropriate, to create a more efficient workplace and realize savings.²

² “Public Services and Procurement Canada 2016-17 Report on Plans and Priorities”

This means (more or less) “save money by providing staff with smaller workspaces”. The author no doubt understood that there are plenty of reasons in the public service for avoiding clarity by favoring more words and jargon over fewer words and plain language. Sometimes the aim is to take the edge off harsh truths; sometimes there is reluctance to spell out specific commitments that may later be grounds for criticism if ultimately they cannot be met. Sometimes it is just seen as more professional, “diplomatic” or “strategic” to be circumlocutious rather than concise, and to use unfamiliar rather than everyday language.

Aversion to disagreement

Document preparation in the public service often begins with consultations involving meetings where anyone with a significant stake in the document gets an opportunity to influence it. The process generates more ideas than can reasonably be accommodated. It is the role of the document’s “owner” to manage the process by ruling out some ideas. This role is undermined, however, by an aversion in the public service to anything that might be interpreted as conflict or disagreement. A desire to keep the peace and give everyone the satisfaction of “seeing themselves” in the document leads to a bloated final product that is worth little as an aid to decision-making.

Insufficient attention to good writing

I am not the first person to observe that it is more difficult to be concise than verbose.

In his preface to *An Essay Concerning Human Understanding* published in 1689 the British philosopher John Locke apologized to his readers for using too many words.

I will not deny, but possibly [my book] might be reduced to a narrower compass than it is; and that some Parts of it might be contracted: the way it has been writ in, by catches, and many long intervals of Interruption, being apt to cause some Repetitions. But to confess the Truth, I am now too lazie, or too busie to make it shorter.³

The French philosopher and mathematician, Blaise Pascal, wrote in a letter to a friend in the mid-1600s: “I have made this longer than usual because I have not had time to make it shorter.”⁴

³ *The Clarendon Edition of the Works of John Locke: An Essay Concerning Human Understanding*, Peter H. Nidditch, ed., Oxford University Press, 1974, p. 6.

⁴ *The Yale Book of Quotations*, by Fred R. Shapiro, Yale University Press, 2006, p. 583. (Original in French. The English translation is mine.)

My role in resisting the scourge of bloated, overly complex plans and reports is two-fold. First, I try to make clients aware that the problem exists in the first place. I try to help them recognize that the ideas they want to convey can be expressed more clearly and that there are advantages to doing so. (Whether the advantages of clarity outweigh the disadvantages is for the client to decide.)

Second, I try to set a high standard of clarity for every product I deliver to, and every communication I have with, the client. I edit my work meticulously – every report, PowerPoint presentation, e-mail message.

Lesson 5 – Everything old is new again.

Consider these excerpts from four Government of Canada reports:

We have approached ‘getting government right’ by linking performance to results and accountability ... We are developing a new relationship with Parliament based on clear information emphasizing performance and results. We will continue to ensure that Canadians can see and judge what their government does on their behalf.⁵

[T]he three key steps to implement results-based management across the federal government [are]: identify results, measure and report. [To achieve this departments are focusing on] 1) *business planning*, the extent to which key results reflect government-wide priorities and are fully integrated into management at the level of the entire department; 2) *continuous learning*, the focus on results in the day-to-day management of programs and policies, that is, the willingness of managers to measure performance, learn and adapt; and 3) *reporting*, so that parliamentarians and the public have easy access to information on what was achieved by the government.⁶

The Improved Reporting to Parliament initiative ... emphasized reporting on performance, that is, delivering on the government’s commitments to Canadians ... Gradual progress is being made in integrating these results commitments into departmental planning.⁷

⁵ “Getting Government Right. Governing for Canadians,” Treasury Board Secretariat of Canada: Ottawa, 1997.

⁶ “Managing for Results 1998,” Treasury Board Secretariat of Canada: Ottawa, 1998. Bold/italic text as in the original document.

⁷ “Managing for Results 1999,” Treasury Board Secretariat of Canada: Ottawa, 1999

Managing for results ... means clearly defining the results to be achieved, delivering the program or service, measuring and evaluating performance and making adjustments to improve both efficiency and effectiveness. It also means reporting on performance in ways that make sense to Canadians.⁸

These citations will sound familiar to Canadian federal public servants; they contain language and concepts central to the federal government's new *Policy on Results* overseen by the Treasury Board Secretariat and the new "Results and Delivery" process managed by the Privy Council Office. If you have already looked at the footnotes you will have seen that the first excerpt comes from a report published 20 years ago by the Treasury Board Secretariat, and the others were published 19, 18 and 17 years ago, respectively. My point is that there is nothing fundamentally new about the "new" policy and processes related to performance measurement and reporting introduced in 2016. Terminology has changed; some procedures and requirements have been introduced and others eliminated. But the basic ideas remain:

Figure 5 – Same old stuff



- identify the social/economic results (also referred to as "outcomes") that you want to influence;
- demonstrate that the programs/policies you are delivering have a credible link to the outcomes;
- develop performance measures that provide evidence of progress toward achievement of results;
- report regularly on performance; and
- use performance information as a basis for resource allocation and adjustments to program implementation.

⁸ "Results for Canadians. A Management Framework for the Government of Canada," Treasury Board Secretariat of Canada: Ottawa, 2000.

Apparent (as opposed to genuine) innovation has its place. Something that looks new is more likely to grab attention and create a sense of progress (“new and improved!”) than something that looks familiar. But let’s at least acknowledge what’s really going on. Performance measurement and reporting is one example of how the core disciplines of public management are underpinned by a small number of simple, robust and virtually “eternal” concepts.

This is not to say that there are never truly innovative policy or rule changes in the public service. But much anxiety and disruption could be avoided if it were recognized that many changes to policies, rules and procedures around public management – though perhaps useful – are often (and unavoidably) superficial.

The same applies to management consulting. Consultants sometimes purport to offer new or unique approaches in areas such as program evaluation, performance measurement or strategy development. It is understandable that they do this to market themselves, but such claims deserve a healthy dose of scepticism. Anything presented as “new” or “unique” is more likely a cosmetic variation on simple and unchanging basic concepts. Current interest in “deliverology” – treated by some in the public service as a new approach to performance measurement and reporting – is a good example. Deliverology is underpinned by the five ideas on the preceding page; there is nothing new about it.

Rather than trying to make an impression with supposedly new and unique ways of doing things, public management consultants will be of most use to clients by helping them frame management challenges in terms of questions derived from basic concepts. For example: i) what social/economic outcomes are we trying to advance? ii) what instruments are we/should we be using to advance the outcomes? iii) how will we know if progress toward outcomes is occurring? iv) how will we know if our instruments (programs, policies, laws, etc.) have been well chosen?

When, as a public servant, you are presented with something “new” – whether it be a policy, procedure or a consulting innovation – try to look for familiar old concepts underneath the supposedly new thing. There is a good chance you will find them. Once you see that you are not dealing with something new at all, you may save yourself considerable work and mental energy.

Lesson 6 – Not everything is “strategic”.

“Create vision and strategy” tops the list of the Government of Canada’s six “key leadership competencies” for executives.⁹ A Deputy Minister “defines and communicates the departmental ... strategy.” An Assistant Deputy Minister “contributes ... to the development of the departmental ... strategy.” A Director General “contributes ... to the development of organizational ... strategy”, as does a Director, who also “implements strategies”.¹⁰ The message is clear: the Government of Canada expects executives to “be strategic”. Executives, understandably, want to be seen as strategic and managing strategic files. This may sound straightforward, but my experience leads me to question whether anyone knows what any of it really means.

For executives to be successful at thinking and behaving strategically, they need a clear picture of what is and is not “strategic”. The picture they observe, however, is murky. The dominant motif is rampant overuse of the word “strategic”. My own cursory review of publicly available Canadian government documents found references to strategic *outcomes*, strategic *initiatives*, strategic *actions*, strategic *reviews*, strategic *planning*, strategic *assessments*, strategic *partnerships*, strategic *engagement*, strategic *investments*, strategic *assets*, strategic *approaches*, strategic *choices*, strategic *use*, strategic *decision-making*, strategic *directions*, strategic *advice*, strategic *communications*, and strategic *vision*. Overuse makes “strategic” meaningless, because if too much is “strategic”, then nothing is.

Figure 6 – Not everything is . . .



In its true sense, “strategic” is an exclusive rather than an inclusive idea; it is meant to refer to a few things, not many. “Strategic” is supposed to indicate that whatever follows it (“partner”, “outcome”, “initiative”, etc.) is critical to the achievement of an organization’s (or a branch’s, or directorate’s, or program’s, or project’s) most important objectives. If a program’s “strategic” partner is truly strategic, then the loss of that partner should create a high probability that the program will fail. An organization that falls short of achieving a “strategic” outcome has not fulfilled its mission.

⁹ <https://www.canada.ca/en/treasury-board-secretariat/services/professional-development/key-leadership-competency-profile/examples-effective-ineffective-behaviours.html>

¹⁰ *Idem*.

A related example of over-use of “strategic” is the contents of a typical “strategic plan” of a government organization. Often these documents are little more than long lists of actions to be taken over a period of years; in other words, they are anything but strategic.¹¹ They are of little value in helping executives filter out day-to-day noise and isolate underlying issues that are critical to success.

Used properly “strategic” identifies the short-list of things affecting an organization’s performance that deserve the highest level of management attention. Elsewhere I have written in detail on the practical implications of strategy and strategic thinking for public service organizations.¹² Suffice it to say that it *is* possible to employ the idea of “strategy” in ways that are meaningful to executive decision-makers and that consultants have a role to play by advising on how to use the term with rigor.

Lesson 7 – See the forest for the trees.

Interesting experiment: in training courses I deliver to public servants on topics like strategy development, risk assessment, performance measurement and program evaluation I will ask participants “What is the purpose of government?” Typical responses include:

- make/enforce laws and regulations;
- collect taxes;
- develop policies;
- run programs;
- deliver services.

Figure 7 – Forest? What forest?



I push for a different answer, because these responses describe *what government does*, not *why it does it*. Eventually I get a version of the response I am looking for: *the purpose of government is to make life better for Canadians by*

¹¹ I recently reviewed a planning document of a small Canadian government organization that included more than 100 “strategic commitments”.

¹² “Interpreting the Possible. A Guide to Strategic Management in Public Service Organizations”, by Mark Schacter www.schacterconsulting.com/publications

contributing to positive social and economic results. The answer that eluded everyone suddenly seems self-evident, and the reaction in the room is usually embarrassed laughter that signifies “We can’t believe we didn’t come up with this on our own.”

It is understandable that what in retrospect seems obvious was not the first thing that came to participants’ minds. The world of work – whether in the public service or the private sector – is the world of *doing things*. It is natural, when asked about the purpose of the work, to think about the *products and services* the organization creates: laws, tax collection, program delivery, etc. These are the “trees”, and it is easy to be lulled into thinking that they are what matter. It takes some reminding to recognize that program delivery on its own is not a valuable accomplishment. Program delivery matters only insofar as it contributes to making things better for people; only to the extent, in other words, that it contributes to social or economic results. These are the “forest” that is easily obscured by the day-to-work work of program implementation.

Whether the task is developing a strategic plan, an evaluation framework, a set of performance measures or a risk assessment, the path of least resistance will often lead to comfortable and familiar territory: what a program (or organization) *does* and what it *produces*. This is not conducive to challenging established ways of thinking or doing business. Even if the *status quo* is generally regarded as satisfactory, preparation of planning documents provides a welcome opportunity to question assumptions. The way to stimulate this type of discussion is to move beyond the “trees” of activity and production to the “forest” of intended social and economic results.

Ask: what are the intended social or economic results of [*the program in question*]? And then observe the sudden silence in the room; people looking sheepishly at each other. Time and again I have seen how difficult it is, even for a group of people who know a program well, to reach agreement about the program’s intended results. And I have seen how the ensuing discussion causes people to question, in a constructive way, things they had never thought to question before.

Ensuring that preparation of core management documents is rooted in awareness that a public program or organization’s purpose is to contribute to results - not just to “be busy” among the trees of program delivery – is one of the most important things I do as a consultant.

Lesson 8 – Stay positive.

We've all been there: a meeting derailed by a voice of negativity. An outspoken person expresses strong views on why the analysis presented at the meeting is wrong or the proposed course of action is misguided. He or she is quick to say things like "this has been tried before: it didn't work". This person is more interested in demonstrating talent for identifying problems than proposing solutions. His interventions may contain important insights but their net effect is to suck creative energy out of the room. For me, as someone often in the position of trying to ensure that a meeting is productive, this person is my proverbial "worst nightmare".

Figure 8 - Positivity



I say this not because I want to avoid disagreement or the expression of alternative points of view; to the contrary, meetings are supposed to be forums where diverse views are expressed, disagreement encouraged and criticism heard. Unanimity and creativity rarely go hand-in-hand. But disagreement and criticism are means to an end; they are not the *purpose* of most meetings.

With the exception of information-sharing or consultation sessions, meetings in the public service are usually called with the aim of completing a task or solving a problem. The goal might be to decide on the content of a new policy, the design of a new program, the solution to an operational problem, or the wording of a draft document. Negative interventions are welcome when made in a spirit of contributing to the completion of tasks, but negativity for its own sake is disruptive and destructive.

I try, but don't always succeed, to channel negative meeting behavior in a positive direction. (The best remedy is when other participants recognize the problem and intervene to change the tone of the discussion.) What I *can* control is my own behavior at moments when I feel it is appropriate for me to express negative views. I do not always get it right, but I aim to strike a balance between saying what I believe the group needs to hear while not contributing to an atmosphere that stifles creative, productive discussion. Before making a comment that might be interpreted as negative, I try to ask myself three questions:

- My initial impulse is to say something that will sound negative, but is it possible to express the same thing in a positive way? If yes, then reframe my comment positively. If reframing is not possible, then ask myself:
- Is it important that the group hear what I want to say, or do I just want to hear myself talk? If the latter, then be quiet. If the former, then ask myself:
- Can I express not only the negative comment, but also propose a way to deal with the problem I am highlighting? If I can't immediately think of a way to address the problem, can I express my negative idea in a way that demonstrates my commitment to working with the group to find a solution?

The fundamental requirement is to put the brakes on your ego. I struggle with this as much as anyone. Criticism, at its counter-productive worst, is the speaker trying to show the group how clever he is, or expressing disdain for the task under discussion. If that is your frame of mind (and we have all felt this way in at least one meeting during our careers!), then your best course of action is to either skip the meeting, or, if you show up, remain silent. Remember that the meeting is about accomplishing something of value to the organization; *it is not about you*. (See also Lessons 8 and 9.)

Lesson 9 – It is not personal.

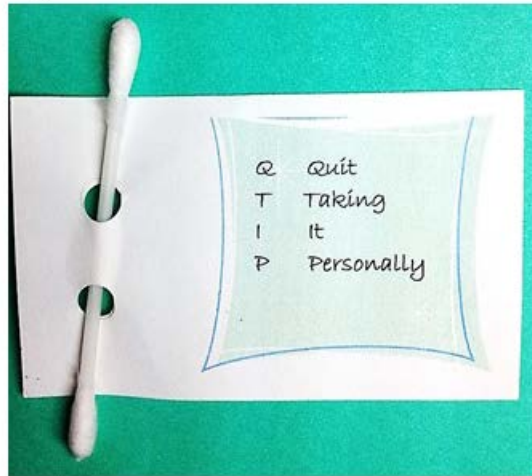
A meeting where ideas flow freely and with purpose – participants agree, disagree, criticize, praise, and ultimately advance their agenda – is a rare and beautiful thing. Two things make it difficult for this to happen: lack of focus and discomfort with disagreement.

A meeting can have a well-prepared agenda, and yet, if not properly managed, spin out of control with people going off on tangents, speaking out of turn and disrespecting time limits. Focus is lost, and with it the hope of achieving anything useful. Discomfort with disagreement, discussed under Lesson 3, is damaging in a different way: it undermines full and frank discussion of important issues. These factors cannot be eliminated. Even the most disciplined person will not stay on topic all the time, nor will the calmest or most thick-skinned person always respond to discord with equanimity. Given the unavoidable presence of these factors, an important part of the consultant's role is to *minimize their negative impact*. This is where things may "get personal."

The consultant uses a combination of influence and control over a group (whether influence or control is more appropriate depends on whether the consultant acts as “authority figure” or “adviser/supporter – see Lesson 2) to minimize negative effects of lost focus and discomfort with disagreement. Directly or indirectly, and from moment to moment, the consultant will try to get some participants to:

- speak less;
- speak more;
- stop speaking;
- align their remarks to the topic being discussed;
- change their attitude (see Lesson 7);
- reconsider their own remarks;
- clarify their remarks;
- justify their remarks;
- challenge what others have said.

Figure 9 – Good advice



The consultant may also inject his own substantive knowledge to advance the discussion. Whatever tactics he uses, the consultant aims to shape and direct group interaction toward a productive end. He is a *manipulator*. In this context, manipulation – which usually carries a negative connotation – is a good and necessary thing. A room full of people left to their own devices will not produce something of value any more than a painting will paint itself or a novel write itself. Someone has to take responsibility for stepping back, seeing the whole dynamic in the room in relation to the group’s intended outcome, and channeling ideas and energy in a positive direction.

The difficulty is that people often dislike being asked to do things in the bulleted list, above. Feelings may get hurt; people may feel targeted, slighted, embarrassed, disrespected. Individuals may *take personally* the consultant's manipulation of *the group* toward a positive outcome. As a consequence they may behave in undesirable ways (e.g. be actively negative – see Lesson 7 – or withdraw from discussion) that work against achievement of the group's goals.

This is not to say that a participant's hurt feelings are necessarily unjustified. The consultant has to manipulate the group in a way that is not offensive. Subtlety matters, and a little humor (especially the self-effacing variety) goes a long way. Ability to nudge a group of people toward a positive outcome without having them feel they have been nudged at all is a skill acquired through experience (punctuated by cases where the consultant fails miserably!).

But even the most skilled and well-intentioned consultant will get things wrong. There is no foolproof way to manage human dynamics; no dispensation from the principle that "you can't satisfy all the people all the time". Someone will inevitably take it the wrong way when the consultant asks him (nicely) to stop talking. A participant in this situation should recognize that "taking it personally" misses the point (because the meeting is about the group's needs, not his own need for self-expression) and is counterproductive. To do his job, the consultant needs you to give him the benefit of the doubt. He doesn't dislike or disrespect you; he is just trying to get the group where it needs to go.

The consultant should model the same behavior. He should demonstrate, through his interaction with participants, that he welcomes being questioned and challenged. There will be times when a difficult participant or argumentative group may make the consultant feel defensive; he may "take it personally" as disrespect for his authority and expertise. If he gives in to these feelings then the game is over; he will have "lost the room", as they say. Participants have an uncanny ability to sniff out a consultant's wounded pride and will take it to mean (correctly) that the consultant is more concerned about himself than the needs of the group.

Lesson 10 – Being right is not the point.

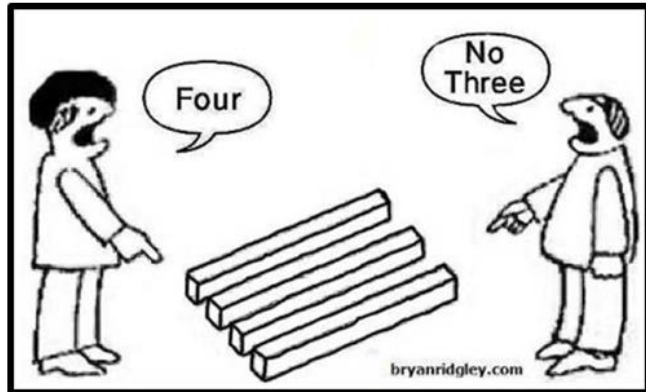
Imagine you are a consultant working with your client. Your experience and technical knowledge tell you your advice is "right" and that the client, who remains stubbornly unpersuaded by you, is "wrong". Imagine also – just to make this more interesting – that an independent expert secretly observing your interaction with the client agrees you are right and

the client is wrong. Ultimately, however, the client does not take your advice, and his organization suffers the negative consequences you predicted would ensue.

You were right. But from the perspective of helping create a positive outcome for the client, what value was there in that? None!

Figure 10 – Whatever . . .

This is the most important lesson I have learned during two decades of consulting, and it has taken me longer to appreciate it than the other eight. I still do not apply it consistently. When I *know* that I am right it is hard to accept that my “rightness” is not so powerfully self-evident that it will not, on its own, get the client to do what I am proposing.



A consultant’s value is created by a combination of capacity to:

- quickly grasp the client’s problem (the problem you discover will not always be exactly what the client thinks he is hiring you to solve);
- understand how your technical knowledge (your knowledge of how things work and of the right way to do things) fits the client’s problem and its environment;
- develop an approach to addressing the client’s problem that is consistent (to the greatest extent possible) with *both* your own and your client’s understanding of the situation (which will not always be identical); and
- make the client feel, by the end of the assignment, that the approach to solving the problem was based primarily (or entirely) on the client’s own thinking (see Lesson 1).

The last point explains why this lesson can be so difficult to implement. I am not by nature a self-effacing person. I like the idea that I have solved a difficult management problem. I would love to take credit for it. But the “glory” – if that is the right word – belongs with the client, not

me. If what I have helped the client do is going to have lasting impact, the client should believe that he was the primary architect.¹³

Being right is a necessary but not sufficient condition for successful consulting.

¹³ The consultant should think of himself as working with the client in a way that, by the end of the assignment, the client will believe he could do the same thing over again without the consultant's help. This may sound like a sure-fire way to undermine one's own consulting practice, but my experience suggests otherwise!

About the Author

Mark Schacter is a public-management consultant and author based in Ottawa, Canada. He began working as a consultant in 1997 and has advised governments, NGOs and international organizations on practical and policy issues in governance, accountability, performance measurement, evaluation, risk and strategy. He is also an accomplished trainer, having designed and led workshops on topics such as governance, performance measurement, evaluation, strategic planning and risk management.

In the 1990s Mark was on the staff of the World Bank at its headquarters in Washington DC; he worked in Africa, Asia and Eastern Europe to help strengthen the governance and accountability of major public institutions, and to support reforms in private sector development. Later he occupied senior positions at the Institute On Governance and the Conference Board of Canada, both in Ottawa. Since 2003 he has run his own firm, Mark Schacter Consulting.

Mark has a BA from Yale University, an LL.B. from Oxford University and an MBA from the University of Ottawa.