



Carnegie Mellon University

- Questions?
- Consulting Professional Behavior
- Models of Consulting
- Capacity Building Consulting

Professional Behavior

- Partnership
 - You are working **with** your client
 - You are responsible for leading the consulting process with them
 - If you keep asking them what to do next, they will fall into a supervisory role even if they prefer you to lead the partnership
 - Individual personalities vary, so you need to learn to read the subtle signs of where to take the lead, and where to follow

Professional Behavior

- Honesty and integrity
 - Do not claim more knowledge than you have
 - It is fine to say "I don't know the answer to that but will find out and let you know"

Professional Behavior

- Preparation
 - Have a clear agenda of what you hope to accomplish at each meeting
 - Be flexible in adapting the agenda during the meeting if necessary
 - Don't be surprised if your client is not as prepared as you are
 - Don't be surprised if your client is relying on you to keep track of what they need to do

Professional Behavior

- Timeliness
 - Be on time for all appointments
 - Try to get there a little early
 - Don't change this if your partner is late

Professional Behavior

- Time management and planning
 - Make sure you take into account traffic conditions when planning your travel time
 - Under-promise and over-deliver

Professional Behavior

- Deadlines
 - Always meet your deadlines
 - If you can't make a deadline for some reason, contact your partner as early as possible and re-negotiate
 - Do not wait until the deadline has passed!
 - Make sure you communicate your valid reasons for not making the deadline and be appropriately apologetic
 - Sometimes your partner will also need to re-negotiate deadlines and you will need to be sympathetic and understanding

Professional Behavior

- Confidence
 - Believe in yourself, in your ability, and in your training
 - Don't be afraid to voice your opinion and suggestions while being respectful and courteous

Models of Consulting

- What consulting models have you encountered?
- How would you describe the consulting model you outlined in your pre-test?
- Review briefly:
Assumptions / Premises Underlying Different Models of Consulting

Process Consulting

- How is this model of consulting fundamentally different from (or similar to) your pretest answer?
- What did you find interesting or confusing?
- What will be the hardest part of being a process consultant?

Process Consulting

- Why do you think process consulting might be a desirable consulting method to use?

Why Focus on Process Consulting?

Sustainability:

- Systems change - new releases of OSs and tools
- Organizations change so their needs change.
- So a strictly technical solution has limited sustainability.

Autonomy:

- Organizations like to minimize their dependency on expensive external vendors
 - Especially if they don't know what they are paying for.
 - Especially if the function is critical.
- Process consulting is a resource-efficient way for an organization to learn to be in a position of managing its own technical change.

The Water of Ayole

- This is a *very different* context that you will be working in.
- But a *very similar* approach is useful in your context.
- Your impressions / thoughts / comments

The Water of Ayole

- From the government extension worker's perspective, why were the pumps failing?
- From the citizens of Ayole's perspective, why were the pumps failing?

The Water of Ayole

- How did the government extension workers change their approach with the village of Ayole?

The Water of Ayole

- What were the roles instituted in Ayole to manage their water source?

The Water of Ayole

- How did the village's organization for sustaining its water source have impacts beyond clean, safe water?

In a CP's own words...

- Video clip from a past final presentation
- When he says "Access", think "relational database"

Compare & Contrast

- How are some problems of being “helped” similar in both cases?
- How did “purchaser of expertise” fail in both cases?
- How did a capacity building approach succeed in both cases?
- What extra benefit came from their new capacity?
 - Beyond water and beyond a database?

Update 4 years later

It turns out that ACCESS was a good stepping stone to implementing the commercial program. The skills learned with ACCESS generalized to the SNAP commercial software, which is easier to use and more flexible. ACCESS gave us a point of reference to be able to investigate other applications such as SNAP. I also understood the need to obtain technical consultation as part of making the decision to purchase and implement SNAP. I learned to utilize IT folks as "brokers" who are able to translate the complexities of the needed technical applications into everyday language. SNAP has definitely given us the flexibility to process data from other counties, in addition to our Allegheny County data. The only disadvantage to SNAP is that I can't hire new staff who already have experience with SNAP like many do with ACCESS.

--Paul Freund, Personal communication

Useful Metaphors

- We can use *Water of Ayole* as a metaphor.
- Draw from it two options:
 - a) Deliver a pump
 - b) Build capacity to sustain a water source

Pump vs. Sustainable Water Source

- What would Pump vs. Sustainable Water Source look like for:
 - Building a database
 - Moving to Salesforce CRM
 - Developing a new WordPress-based web site
 - Creating a technology plan

Review calendar...
