

DEVELOPING INTERNAL CONSULTANTS

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Many organizations are concerned with initiating, implementing, and evaluating change programs designed to increase the effectiveness and efficiency of operations.

A key issue in formulating a change strategy in an organization seems to be how to explode change programs over a relatively short turn-around time and yet manage the size and role of the change facilitators.

Another issue deals with the expense and investment required to mobilize and maintain an effective and coherent consulting team, both internal and external.

Organization consulting is a multi-billion dollar business. The U.S. Government alone spends billions of dollars, according to President Carter's statements during a recent press conference, for contracts awarded to external consultants. Pressure is mounting everywhere to have the organization handle the major share of consulting internally.

This article will describe three

situations where a unique strategy to increase the organization's capability to do internal consulting was implemented.

The Question of Making or Buying

Once an organization decides to pursue the strategy of increasing the internal capability to offer organization consulting services to its management, one of the initial issues that must be resolved is whether to develop the capability from existing personnel on board or whether to hire the required skills from outside.

Some of the arguments for hiring outside, already trained, experienced organization consultants are:

1. *Fast turn-around.* Resources can be recruited, selected, oriented, and positioned in specific projects within a relatively short period of time, usually three to six months.

2. *Technical Energy.* Individuals recruited bring with them fresh ideas and different technological and personal approaches to organization problem solving from

which a rich pool of internal knowledge can be molded.

3. *Credibility.* Experienced consultants typically have an easier time of being accepted by the organization's management.

4. *Time Sequence.* The hiring process can be scheduled around critical milestones of an expanding change strategy, thus minimizing the possibility of having idle resources.

5. *Ease of Supervision.* Experienced consultants require less supervision on the part of the functional organization consulting executive.

Some of the arguments for developing the capability utilizing existing internal personnel are:

1. *Organization Knowledge.* Internal people are more familiar with the past and present conditions of the business, its policies and practices, and the unique character of the organization and its people.

2. *Multidisciplinary Approach.* Potential consultants can be recruited internally from many different functional areas and technical backgrounds, thus enabling the

organization to collect varying points of view on how to analyze and solve organization problems.

3. *Job Enrichment.* The strategy can serve as job-enrichment program for individuals wanting to expand personal and professional skills.

4. *Technical Coordination.* Internal resources can be trained around a specific methodology, a common philosophy of change, and a consistent approach to project documentation and evaluation.

5. *Building for the Future.* Internal resources can be developed in light of forecasted demand on consulting requests, and be available to the organization on the basis of needs as they arise.

6. *Flexible Staffing.* If the workload of the internal consulting staff decreases, staff members can be reassigned more easily because they possess other functional skills and experiences.

The need for making or buying is not as discrete as the lists of arguments may suggest. The action strategy selected usually is a combination of two alternatives — that is, the organization will hire a very small nucleus of experienced consultants from outside the organization, and develop the remainder internally.

Client Background Profiles

Client A — This client was a multi-national high technology firm with a total employment of over 40,000 and total revenues in excess of \$2 billion. The headquarters of this client were in the Midwest.

The organization was 20 years old and experienced a tremendous growth rate, both internally as well as through acquisitions. Structurally, the organization made extensive use of the project and matrix management approaches.

The utilization of these two methods of organization structure created significant problems in coordination, planning, integration, role definition and role clarity. It is within this context that experimentation with organizational consulting began. The management of the organization was interested in methods and techniques that would help executives manage stresses and strains created by interde-

pendent and highly integrated work teams.

An internal organization consulting function was thus created to assist management personnel, corporate-wide, in team-goal setting, intergroup problem solving and team development.

Within a period of one and one-half years, an internal staff of three internal consultants and two external consultants was active with approximately 60 clients, worldwide — far too large a number to be effectively serviced.

Since the matrix and project management structures were perceived to be transitional in nature by top-management, there was no clear way to predict the client base in the future, or the ability of the organization to support a sustained investment in financial costs. Thus, the decision was made to develop a group of 81 individuals from corporate, division, and plant locations' personnel functions that would serve at management discretion as internal consultants on a part-time or full-time basis.

Client B — This client was a multi-national, high technology firm with a total employment of over 50,000 and total revenues in excess of \$2 billion. The headquarters of this firm were in the East.

The organization was formed at the beginning of the century and has been experiencing in the last 10 years a history of declining profits and an erosion of market position for some product lines.

The appointment of new top executives set in motion a corporate renewal strategy that allowed experimentation with contemporary methods of managing organization change in order to improve profitability.

An internal organization consulting function was created to assist corporate management in designing and implementing a step-wise organizational improvement strategy. Within a period of six months, an internal staff of two consultants and two external consultants were responding to a top-management client system comprising most of the operating division heads, some corporate functional staff executives and several

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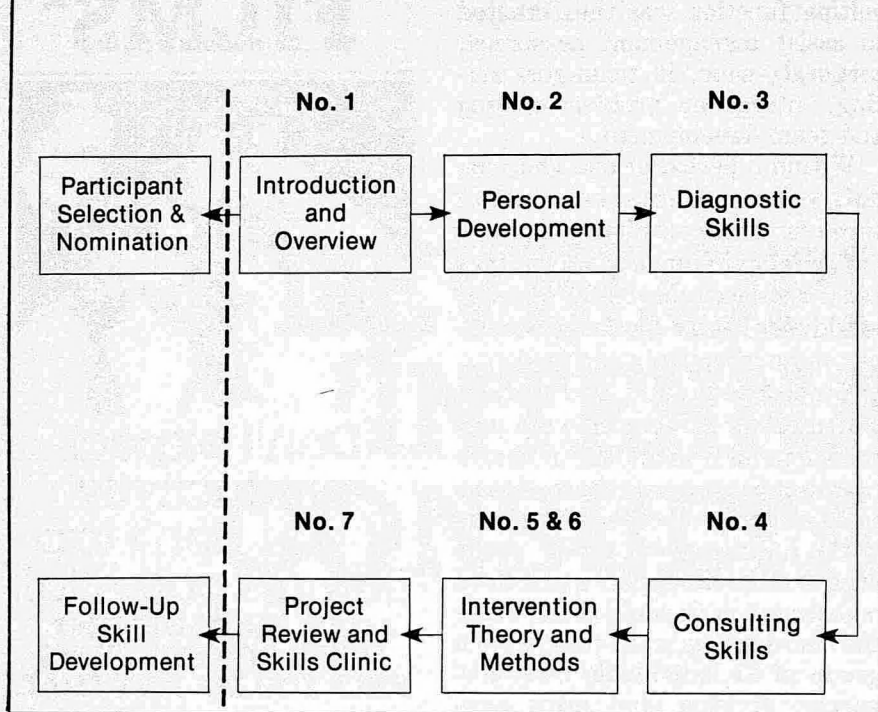
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Figure 1.
PROGRAM MODULES



plant managers.

Since the organization was attempting to minimize overhead expenditures, it seemed inappropriate to increase the internal or external staff. The decision was made to supplement the core staff with a network of 51 adjunct consultants selected from corporate, division, and plant locations' personnel, industrial engineering, training, and other functions to be trained as part-time organization consultants, serving at the discretion of management.

Client C — This client is the Federal government of a Latin American country experiencing high economic growth and expanding industrialization. The government's decision to develop internal consulting capabilities came about as a result of labor market pressures on the small number of available organization consulting resources. Most organization consultants in this country had been trained in the United States.

The Training Program Design

In all these situations, the program, in general terms, involved the following typical aspects:

Program Objectives

The program was designed to

train consultants in the theory and practice of organization consulting, including: consulting skills; theories and strategies of planned organization change; principles of, and methodologies for organization diagnosis and problem solving, program evaluation techniques; and project management skills.

Program Design

The basic design of the program alternated workshop modules with normal working assignments, so that participants would be able to experiment with, and apply, their learning during the course of the program. The program was built around seven (five days long) workshops focused on the significant subject areas of a consultant's knowledge and skill requirements (Figure 1). The underlying philosophy of the module sequence was to alternate conceptual with application modules, technical skills development with personal skill development — providing a natural rhythm to the program. Workshop modules were scheduled approximately two months apart, in order to meet the availability of the participants and some other operational requirements.

Learning Design and Methodology

The learning design combined theoretical presentations with practice activities so that participants would not only develop consulting skills but would also understand the theoretical basis of the consulting role. The program was conducted in such a way that it provided participants with an understanding of the workshop process from our perspectives: staff administrator, leader, observer and participant. Although at times the staff made a considerable input of theory, there were ample opportunities for participants to develop their own skills through a variety of structured and unstructured exercises.

At the conclusion of each exercise, the quality of observations, reports, and evaluations were discussed with focus on skill development of the participants. Participants received feedback regarding their observation skills through comparison and group discussion. A major focus was the importance of objective observation and accurate recording of the behavior exhibited by the participants as well as the role these observations played in the analysis of, and suggestions for, development needs.

An important element of the program design was the personal development of participants. Through structured exercises, theory input from the staff, and instrumented diagnosis, participants were able to develop information about themselves and use that information as a basis for their growth and development. They were placed in unstructured situations where they were asked to examine their own behavior; experiment with alternative behaviors, ideas, and values; and examine the consequences.

Between workshop modules, assignments were given to participants to provide them an opportunity to practice the skills they had learned. One of these assignments was to provide an experience in designing an individual project. Participants were asked to explore all phases of the consulting activity: needs assessment, program design, implementation and evaluation. These practice ac-

tivities served as an integrating mechanism for the theory and methods covered during the program workshop sessions.

Evaluation

Evaluation of the program's effectiveness in training consultants was not the typical end-of-program examination, but an integral part of each workshop module. The principle evaluation technique was a continuing four-way feedback process: staff to participants, participants to staff, participants to

participants, and participants to themselves. Two primary standards formed the basis of the evaluation: (1) Criteria were rooted in requirements of the consulting process, and (2) Participants' expectations were clearly described throughout the training process and were congruent with the expectations of the staff.

Program Outcome

The success of the training program was dependent on the participant's ability to:

- Diagnose problems and opportunities in the internal and external environments.

- Help with the process of bringing about needed changes in operations and/or the social system as identified by the diagnostic techniques.

- Help with the process of evaluating the success or failure of the techniques and programs that had been introduced to bring about the needed changes.

Program Staffing

The program staff was comprised of organization consultants both internal and external. The consultants had significant consulting experience and, as a group, saw themselves as pragmatic and problem-oriented. A continuing focus of their efforts during the training program was to link learning situations in the workshops to parallel situations in their consulting organizations. Guest speakers from academia and industry were utilized on occasion to supplement and complement the program staff's experience and backgrounds.

Reference Manuals

A reference manual was developed for each workshop module. The purpose of these manuals was to capture and make available to participants key conceptual, practice, exercise, and reference materials for each topical area covered. Since the literature is so diverse and scattered in the field of management and organization behavior, synthesis and integration of alternative approaches, methods and theories of organization consulting were necessary. Each manual consisted of approximately 150 to 200 single-spaced, typewritten pages.

Extensive bibliographies by topical area, e.g., diagnosis, consultation, intervention theory and methods, and evaluation were also constructed.

The participants could use the manual as the basic instructional reference tool during the program from which individualized reading programs could then be extended upon program completion.

Much was learned from these

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three situations that has served to increase both the quality of training design as well as the effective use of an internal consulting network. Key problem areas surfaced. Some were:

1. The training program needs to be further supplemented with specific skill requirement modules in order to address unique development needs of the participants. Some examples are: a) questionnaire design and validation, b) presentation skills, c) model building and testing, and d) planning skills.

2. Leaving the utilization of the newly developed skills of the participants to management's discretion appears to be an incomplete strategy. Coordination at the functional level is necessary and required in order to facilitate the hooking up of specific skills to specific problem situations.

3. A large number of participants find consulting a very attractive career path to pursue. Unless this aspect is well managed, many will leave in order to locate full-

time opportunities to expand their consulting skills and ability to practice newly acquired skills.

4. The development of an internal network of consulting resources created apprehension amongst the sister staff functions, e.g., personnel management, management training and development, and organization planning functions. Ways to integrate these resources with other functions need to be explored and implemented.

5. The internal compensation system did not lend itself from a job evaluation viewpoint to capture the increased job worth of the participants, thus causing some to pursue more financially rewarding opportunities on the outside.

6. Once participants developed some basic consulting skills, the tendency developed to apply these skills regardless of the situation or the need. For example, team-development sessions were conducted where there was not a clear sense that increased teamwork was a problem solution.

7. Since the program was conducted off-site, in a group environment, an over-reliance on working in groups, off-site developed. The perception developed that organization consulting takes place in motels or resorts with small groups. Reinforcing the notion during the program that organization improvement can only effectively take place on-the-job working with individuals, pairs, groups, entire organizations or functions needs to be further stressed and modeled.

8. Since a major part of the program focuses on the use of self as a potential tool for the change facilitator, some T-group techniques were used. Some participants began to emphasize these aspects to the detriment of task accomplishment, efficiency and results evaluation. A better balance is needed in the program content with pragmatic, business management theory and practice.

On the positive side, the following objectives were accomplished:

1. All three client organizations have decreased the cost of external consulting resources.

2. Two of the three client organizations use organization consulting resources more on a project basis than on a functional basis.

3. A rich variety of projects have been managed by the newly developed resources ranging from team-building, job design, attitude research, and management training to structural reorganizations, redesign of planning systems and conducting cost reduction programs.

4. An unusually high number of participants have been promoted to increased levels of responsibility in their original professional fields.

5. In one of the three organizations, integration of the organization consulting principles and practice took place within the management development program.

6. Several participants pursued further academic training in psychology, organization behavior, and management.

7. An informal support system has been developed within the three client situations allowing participants to help one another in personal development, project design and technique development.

While much was accomplished and many problem areas surfaced, additional evaluation is needed in order to further operationalize the organization consulting process in these client systems. These three pilot situations have been intriguing case studies to follow and to watch further in the years to come.

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