

Masterful Consulting¹

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Sam, an eager young consultant, was leading his first client engagement. Bright and aggressive, with a fresh MBA under his belt, he had been under the tutelage of one of the best partners in his consulting firm for three years. Now, having received a set of important distinctions and a proprietary consulting process, he was ready to strut his stuff. He did everything his partner taught him, and it seemed to work. He showed the clients all the important and relevant research that pointed to the flaws in the client organization. He used a team of bright consultants to gather and analyze data about the client, its competitors, and key trends in the industry. He showed the client the changes it needed to make to get ahead of the industry in its market space. At each step along the way, the client seemed eager, interested, engaged, and impressed with Sam's know-how.

At the final meeting, Sam's report was well received and a team of leaders in the client organization almost instantly accepted the recommendations he made. They assured Sam of their commitment to implementing these changes and even adopted Sam's sensible timeline, which balanced a high degree of urgency with awareness that these things take time. At the end of this meeting, Sam was one happy consultant.

Months later, he could not have been more disappointed. For the first few weeks, the client began making plans to implement the recommendations. However, an unexpected dip in sales, coupled with some missed product development deadlines, caused the client to shelve some of Sam's recommendations. They assured him it was a temporary problem, and they would get back on track as soon as this temporary setback was addressed. They never did.

It was obvious to Sam that the process and the expertise he provided were right on target. The fault, clearly, lay in the client's lack of ability to deliver on its end and to stick with the plan. In debriefing with the partner about the failed effort, the partner pointed out some things Sam could have done differently, offering clever tricks of the trade that might have made a difference. The partner also pointed out that these things happen and that it was part of the learning process. "You are destined to do great things," the partner said. "Don't let it get you down."

The partner's sage counsel was welcome, and Sam was eager to tackle the next client opportunity with renewed vigor. Little did he know that it was almost inevitably doomed to fail. It would make money, but it wouldn't make a difference. Nor did the partner have any inkling of this. No one else in the firm did either. They were making plenty of money, in fact, with enough financial success that this and other failures were easily shrugged off. The failure pattern was left unexamined while the consulting firm got to continue the game.

Sam's story is repeated time after time in consulting engagements all over the world. Many consultants have seen outcomes like Sam's many times yet find themselves in the same scenario. Caught in the same pattern that most of the consulting world is following, they cannot see an alternative. As a result, many, if not most clients are either cynical about consultants or angry about how intractable the whole system is. Yet they too continue to participate in the pattern, hoping that the next time they hire a consultant, the outcome will be different. It rarely is.

Savior and Problem-Solver

To understand how to break out of this pattern, we need to go beneath the surface of the rules of typical consulting approaches and examine the goals and strategies that drive those rules. We will start with goals, for the goals of consultants, as for any human being, form and inform the strategies they use.

Take a moment and ask yourself: What do you want as a consultant? Why do you consult in the first place? You could want many things. If you are like most consultants, however, your goals probably fall into one of three areas.

- To add value (fix a problem, plug a hole, introduce a new process or system)
- To make a lot of money
- To make a profound difference—to shift the organization to a new level.

The primary goals of many consultants employing the typical rules of consulting are to add value and to make a lot of money. The consultant typically offers help in the form of expert advice or an expert process. In a competitive bidding situation, often the consultant must also convince the client that this expertise cannot be found elsewhere and not only is it well worth it, but the client is at risk of failing without it. In most cases, clients are inclined to believe this is so. In addition, the consultant will often leverage the talents of others to expedite the consulting process for the client.

These goals, to add value and to make money, get translated into strategies, which in turn directly affect the actions and the outcomes of the client engagement. Let's begin with the primary strategy that drives most consultant's actions and behaviors.

The Savior Strategy

Every day, throughout the country, clients and consultants are participating in a silent and powerful contract, often unaware of its existence. It is the basis of what I call the savior strategy. To understand this strategy, we need to strip away the complexity of consulting and get down to its essential form.

At the core of any consulting activity is the desire by the client to get help and by the consultant to offer help. Help tends to take the following form:

- The client defines a problem.
- Client hires consultant to either solve the problem or tell the client how to solve it.
- Client pays for this service and sometimes implements the advice.

The desire to be helpful runs deep in the psychological makeup of most consultants. They have spent many years honing their craft, driven by this desire. More specifically, they have a belief in how organizations can be better run, and a genuine desire to show clients the way.

Simultaneously, clients often have a deep desire to be helped. Rarely seeing consulting as an aid for growing or developing the organization, they often seek out consultants when something in the business is not working well or is "broken." Out of consultants' desire to help and clients' desire to have something "fixed" is born the savior strategy. To occur, the savior strategy requires two consenting parties—the helpers and the receivers of help. The helpers must be motivated to help and also believe they have a better way. The receivers of help must want to be saved, believe they are capable of changing, and believe that the helpers have a magic elixir obtainable only from the helpers.

Many consulting firms are brilliant at playing the savior game and preying on the fears of clients that, without the firm's help, the company is either doomed or in deep weeds. These consulting firms make impressive presentations, backed up by recent research, demonstrating the trends that are impinging on the company, followed by multiple examples of how clients have been helped enormously by the consulting firm's intervention. That these charts are often pseudoscientific is usually not evident, because the client so wants to believe that the consulting firm will save them. It is a lesson carried over from the snake oil salesman of the 1800s, who made a good living selling exotic elixirs to "cure all that ails you." When you want to be fixed or saved, you are easily prone to being convinced.

Preying on the client's need to be saved is a significant *modus operandi* for many consultants, particularly those that employ an "expert" model of consulting. What better way to hook the client into believing in the necessity of hiring the consultant than to cleverly participate in the game. To be fair, most consultants don't seek to "hook" the client at all (at least not consciously). They simply want to be of service and to add value in the best way they know how—by solving a problem. Nonetheless, both consultants and clients participate in the same implied contract. You, the client, need help. I have what you need. I'll sell it to you, and then you'll have it.

It sounds so wonderful. But the negative consequences of the implied contract can be severe. Once the consultant leaves, the client organization will not have more knowledge than it had before, because knowledge—the consultant's stock in trade—cannot be given away. You can give people information; it's like giving them a bag of groceries. But knowledge transfers less easily. In the realm of human and organizational dynamics, knowledge must be learned and earned through exploration, deep shared thinking, and often struggle. Many consultants do indeed often have useful knowledge, but by the time it is transferred in the form of a presentation, report, or other form, it is rarely more than information. Since the knowledge behind that information is rarely transferred, it is never truly owned by the client organization. The bookshelves and credenzas of managers around the world are laden with well-crafted consultant presentations—collecting dust.

Yet in spite of this, clients are happy to pay for information and to expect positive results. This willingness to be "done to" and be "given to" is natural. Most organizations are overwhelmed, and they look for the quick fix. Most consultants are happy to oblige.

Sidebar

Waving a Magic Wand

I used to work in a consulting firm that had a well-developed process for "transforming" organizations. Our primary intervention was a four-day "team building" event that many people described as life changing. The beauty of our approach was that we started with the executive team, helping them through very difficult issues. The executives came out the other side with a renewed sense of passion for their leadership and for working together, thus, they were ripe to sign on the dotted line to have others throughout the company experience the same thing, for a hefty sum of money. We also did a number of other things to help the client "align" its resources and create a high-performing culture, but the team building was the primary transformation vehicle.

Having led many of these interventions, however, I noticed a pattern. In most cases, the executives were happy to have us "roll out" our process throughout the company. The more we could do for them, the better, thereby freeing the executives to focus on things they were more comfortable with—strategy, dealing with investors, planning, and the like. Metaphorically, it was as if they wanted us to wave a magic wand over them. And we did. However, in almost every case, little or no change took place in the client organization. Individual people might be transformed, but the client organization as a whole remained stuck in neutral.

In the few cases where we struck a different relationship and where the client took full responsibility for the transformation process, we had much better results. Naturally we preferred the latter scenario, because we sincerely wanted to see enduring results from our work. However, we were perfectly willing to accept the former scenario. As one of my colleagues, Tom Shenk, puts it—"great payday, no difference."

End Sidebar

Secondary Strategies

The goal to add value and make a lot of money gets enacted and expressed through the primary savior strategy. This strategy, in turn, produces secondary strategies that support the desire to help and to make money. These strategies, in turn, determine the kinds of choices consultants make. The typical strategies of the consulting process fall into one of three categories: the consultant's relationship to his client; the consultant's relationship to knowledge; and the consultant's relationship with himself—his character, in other words.

In the arena of relationship to client, most consultants employ a strategy that gives them tacit power over the client, and they use that power to try to get the client to do what they believe is best for the client. In the arena of relationship to knowledge, most consultants claim and use specialized knowledge, processes, tools, and techniques as their primary added value. In the arena of relationship to self, most consultants seek to develop presentation and sales skills for gaining more business. Let's look at each more deeply and its consequences.

Create a "Power Over" Relationship to the Client. Most consultants say they want a partnership with their clients. They talk about the importance of give and take and in working together to solve a problem. And, indeed, in most cases that is what they desire. However, many consultants are unaware of the multiple ways their behavior implies a different relationship—one best described as having "power over" their clients.

Consultants who consciously or unconsciously employ a "power over" strategy do a number of things that are designed to maintain control over the client and the consulting process. For example, they chop up the business into parts in order to analyze it. On the face of it, this seems sound. However, the more consultants do the work, the more likely they will understand the business better than the client (at least those aspects relevant to the consulting engagement). Consultants then use this understanding as leverage to get clients to do what the consultants think is best for them. Additionally, many consultants control the consulting process as much as possible, convincing clients that these "tried and true" methods guarantee best results. Since consultants know these methods, and the clients do not, a "power over" dynamic is created or maintained. Finally, the very act of promising to deliver success feeds off the client's desire to be fixed or saved and puts them in a childlike position in relationship to the consulting "parent."

Claim and Use Specialized Knowledge, Processes, Tools, and Techniques As the Primary Added Value. Most often, the added value consultants provide in the form of knowledge, tools, and techniques is really worth

something. So is the research they tailored to meet the unique needs of the client. Conducted by bright and eager consultants and led by savvy partners, consultants do provide useful analyses, sound techniques, and thoughtful recommendations, much of which has real value for the client. The only rub is the claim that it is specialized and unavailable elsewhere.

Consultants place a high value on being special, on having something the client cannot get anywhere else. Sometimes they claim that the knowledge may not be special, but the methods for implementing that knowledge are. However, rarely does a consultant have something a client can't get elsewhere. Many times I have seen consultants scramble to put together a presentation from a recent *Harvard Business Review* article, slap their logo on it, and claim to have specialized knowledge. Astonishingly, it works. They dazzle the client with presentations, delivered with panache. In truth, if this knowledge is this available, how "special" can it be? The real added value comes not from the information but from the ability to get clients to actually use this knowledge well. This ability is indeed a rare commodity among expert-based consultants.

Develop "Self" Skills for Gaining More Business. Many consulting firms teach their new consultants the importance of presenting themselves well. Partners "dress for success" and encourage their more junior consultants to do the same. They place a high emphasis on conforming to the kind of social etiquettes that appeal to those in positions of power in their client organization. And they hone their influence and persuasion techniques. To many consulting firms, developing "self" is about outer image and presentation, not about the "inner self." Indeed, you might argue that the "inner self" has little to do with effective analysis. Masterful consultants take issue with this, however. One masterful consultant I know left her highly successful partnership in a firm finally fed up with the over-attention to image and inattention to issues of character and lack of true commitment to the client. In her words, "the hypocrisy of how the consulting firm ran counter to the very principles it taught clients was too much for me to bear."

Each strategy can generate an endless number of actions. Many actions, however, fall into a typical set, represented in the far right column in Figure 1.

Many of the larger, more "successful" consulting firms use two additional and very questionable strategies as part of their financial wealth plan. They often use less experienced consultants and charge far more to the client to create high profits. And they offer high-margin "bolt-ons" ("how about some fries with your burger") as a critical added resource.

While I think the typical approach in Figure 1 is fair and close to reality, it is also a caricature. Few consultants truly operate exactly like this. Many do some of these things as well as some that are more masterful. Certainly, few consultants will ever admit that they are focusing primarily on making money. In subtle ways, however, they make choices that are not in the client's best interest. Sam was a great example. His mentor taught him that the client often can't see what it needs, and that he and other members of the consulting firm knew better than their clients. Had the client known better, it is reasoned, the client would not have needed to hire Sam's consulting firm in the first place. This frees up Sam to recommend things the consulting firm has to offer without hesitation or concerns.

Figure 1 [see fax]

Consultants everywhere are following the same process. In some cases, the consultant follows these strategies and actions and does indeed help solve the problem and leave the client satisfied. In some cases, it is a waste of effort: Remember those bookshelves of reports collecting dust. Rarely, however, does advice giving or help in the forms most consultants provide make a difference. It rarely adds energy to the system. It does not challenge people to think differently, nor cultivate deeper understanding. It rarely penetrates the underlying patterns that form and shape the client and keep them from achieving a higher level of performance.

What is the alternative? The consultant moves from being a savior and problem-solver to being an empowering partner. This requires a fundamental shift in one's inner stance as a consultant.

Empowering Partner

John left the debrief session of the consulting engagement thinking he had done a decent job. He had helped the client accomplish the task, had met all his commitments, and felt satisfied his deliverable was better than most could have done. The debriefing went as expected, with nothing unusual. John shook hands with the client, leaving her with this message: "Sheryl, if you ever have any other work like this, please don't hesitate to call." Sheryl assured him she would. John was comforted by her response.

Months went by and there was no call. Through his connections John learned there were indeed two other similar projects that required his kind of expertise, yet he was never called. After eight months, he decided to take action. He called Sheryl to ask her why he was not considered. She gave him two reasons related to their internal decision making, both of which seemed compelling but did not persuade him. He asked her again if she was pleased with his work, and she indicated she was.

What John did not know, and would likely never find out from Sheryl, was that his work was adequate, but not great. He had done everything he could, but she felt no connection with him. Moreover, she felt that his work would not take them to the next level. He fulfilled the contract but did not impress. The problem wasn't his method or his reports. The problem was that he lacked the inner magic that inspired others to challenge their assumptions. He was good, but not masterful. Sadly, he yearned to be great, so not getting called back was painful. He didn't believe her answer to his question, yet had no way to probe deeper to learn what the real problem was. He felt rejected and confused.

While much research exists on the practice of consulting, the profession is still far more art than science. John pays attention to the science and comes equipped with the latest techniques and models. But he misses the artistry that is the essence of masterful consulting.

The Artistry of a Masterful Consultant

Like a great painter, the masterful consultant relies on more than simple technique. He knows that each client situation is unique—a blank canvas. While there are principles to guide his actions, he must create anew the process and the relationship to produce the greatest effect. Where the painter works with paintbrush and palette, the masterful consultant works with "self."

All good consultants have an inventory of theories, models, tools, and techniques to draw on. Without them, most would be lost. Yet what differentiates master consultants from others has nothing to do with this inventory. It has all to do with the "feel" of the situation, with the ability to act effectively "in the moment"—to sense what is going on in a given situation and then take the action that meets that moment. To do this well requires consultants to divest themselves of the past and the future, of fears, anxieties, and desires, to be present, and then to take action without ego. Theory, models, instruments, and techniques can't teach this, because it arises from the consultant's inner stance—that invisible quality elusive to so many. The mastery, of which I speak, has to do with the ability to shift patterns in client organizations. That is the true magic of masterful consulting.

The Master Consultant's Goals and Strategies

Every organization is driven by a set of patterns. The way we hold meetings has a pattern. The way we communicate has a pattern. Our leadership style has a pattern. These patterns form, mold, and harden until they become the very culture of organizations. The goal of consulting mastery is simple: to have an impact on the fundamental patterns of the client organization in order to produce profound and deep change.

To accomplish this goal, masterful consultants adopt a primary strategy best characterized as an empowering partnership—one designed to shift the client organization to a new level of health and performance. An empowering partnership is one where both consultant and client are touched by each other. Together, they create an authentic, vulnerable relationship, where the client, the process, and the relationship itself are all explored, deepened, and enhanced. They see their work together as co-creative and filled with learning that is every bit as imaginative as it is well designed. Scottish philosopher David Hume said it well when he wrote: "The sweetest path of life leads through the avenues of learning, and whoever can open up the way for another, ought, so far, to be esteemed a benefactor to mankind." This avenue of learning traveled by an empowered relationship is the heart of the master consultant's primary strategy.

Following this primary strategy, masterful consultants use three secondary strategies, each fitting the three arenas of consulting: relationship with client, with knowledge, and with self.

1. *They develop a client-centered partnership.* They see clients as whole system, and encourage their clients to do the same. They are clear that clients have the capacity to grow themselves. Therefore, they position themselves as guides or partners, not experts. Finally, they see their clients as responsible for the outcome while remaining a partner in the process.

2. *They share knowledge openly and freely.* Masterful consultants know that the key to effectiveness is in applying knowledge in real time. In addition, they seek wherever possible to transfer knowledge and enhance the wisdom of their clients.

3. *They see the quality of their character as a catalyst for transformation and learning.* Masterful consultants recognize that the most important differentiator between good and great consultants is the quality of their character. As a result, they spend a great deal of time developing their inner self.

To better understand these three strategies, let's examine each one more thoroughly.

How Masterful Consultants Relate to Their Client Organizations

The empowering relationship masterful consultants form with their client organizations may be obvious to many, but it is also difficult to attain. Almost all consultants believe they form relationships with their client organizations with the intent to empower them. They say they create conditions in which the client owns the process or the outcome, and that their intent is to leave the client more capable than when the consulting process started. This mindset alone, however, is not what differentiates masterful consultants from others. It is the degree to which they behave congruently with it. While many consultants espouse the importance of the client owning the process, and of creating a true partnership with the client, their behavior, too often, tells another story.

Let's look at one example. Craig is a competent consultant who believes strongly that his client needs to own the process and the outcome of the consultation, and he believes the members of the client organization need to implement his ideas themselves in order to grow. During a planning session to develop a two-year plan to execute a fairly radical Six-Sigma process throughout the company, Craig led the way. He offered a model for executing the ideas, and walked the group of key executives and HR staff through each carefully designed step. They followed Craig's lead, feeling a need for his guidance in an area that seemed overwhelming and highly complex and made decisions consistent with Craig's framework. When members of the planning team offered ideas that Craig believed were unwise, he deftly and compassionately explained why and offered an alternative suggestion. The team felt persuaded by his viewpoint, never controlled. Based on initial positive feelings about Craig, all appeared to be going according to plan.

Had you looked at Craig's behavior more closely, however, you might have noticed signs of a less-than-ideal outcome. Throughout the meeting he made suggestions far more often than he asked questions or invited comments. When he did ask questions, it was almost always with an answer already in mind. Subtly, Craig steered the group toward the pre-existing answer. Neither did he solicit feedback about how they were feeling about the process or decisions made. Additionally, numerous nonverbal signs were ignored, such as crossed arms and restive expressions suggesting that team members were disconnecting from the process. Regardless of these signs, Craig left feeling successful, having imparted his hard-earned wisdom to the members of the team. The CEO felt as if he got his money's worth. After all, wasn't he paying Craig for knowledge?

The missing ingredient here was that the team, while following Craig's lead, did not psychologically own the change process or the outcome, because they never had to think it through for themselves. As a result, they did a poorer job in the implementation phase than they did in the diagnosis. Midway through the process, the implementation stalled as other business concerns came to the fore. To this day, Craig blames the team members for their lack of commitment and ability to act with conviction, not himself for the subtle and mounting ways he precluded their own learning process.

In contrast to Craig's experience, masterful consultants keep their clients in the driver seat, committed to their ownership of the outcome. It's a conscious process, one that calls for rigorous self-observation and attention to the potential to want to act in a heroic fashion and "fix" the client's problems. Masterful consultants seek feedback to minimize their own unconscious patterns that might result in taking power away from their client organizations. In other words, they walk their empowering talk. Unlike Craig, masterful consultants will more often ask questions than give answers. They act as a facilitator, committed to having the planning team members think the process through for themselves. They might offer a model, but at the same time readily accept one of their client's if it achieves the outcomes of ownership and committed action necessary to implement change.

Masterful consultants know that the magic is not in the models, but rather in the intangibles: the learning process, the consultant's relationship to the client, and the consultant's character. Masterful consultants behave more congruently with their beliefs because they examine their own behavior deeply and fully. They are also deeply committed to the client having freedom of choice, ownership of the process, and valid information upon which to make decisions. They are far more consciously facilitative than someone like Craig. While Craig says he is committed to those same principles, his greater, unconscious commitment is to be "brilliant" in the eyes of the client—and to be "right."

Owning the outcome is one of three features of the client relationship that masterful consultants form. In addition, masterful consultants treat the whole system as the client, and wisely negotiate the dilemmas posed when the person paying them acts inconsistently with the needs of the whole system.

Underlying masterful consultants' success is their abiding commitment to a partnering relationship, one where power is shared equally between client and consultant during the change process. One thing that differentiates masterful consultants from others is the depth to which they hold true to this principle, not merely paying it lip service. In the act of defining a consultant-client relationship, for example, most masterful consultants have a very candid conversation with the client about mutual boundaries, expectations, and desires. While other consultants tend to wait to discuss their relationship until problems arise, masterful consultants deal with it up front. In the contracting phase of the consulting engagement, they will place as much if not more emphasis on defining the

desired qualities of the interpersonal relationship as on the financial relationship. They discuss and agree upon who is in charge of which meetings, when and how to give feedback to each other, under what conditions either party can exit the relationship, expectations about honesty and vulnerability, and much more.

Sidebar

The Whole System Is the Client

One master consultant I interviewed was engaged by a highly conservative organization to coach an executive on how to become a more effective leader. The targeted executive (let's call her Nancy). was known to be mercurial in her behavior. and often rubbed people the wrong way. After conducting many interviews, the consultant concluded that Nancy's behavior was only part of the problem. The other, more fundamental element was the organization's hidebound intolerance of creative ideas that ran counter to its traditional ways of doing things. This straitjacketing resistance to change frustrated Nancy, who wanted to give people a jolt. In her frustration she often acted ineffectively, barked orders, and blamed others for their unwillingness to take risks. These were coping behaviors that only served to exacerbate the perceived problem.

While most consultants would be happy to spend most of their time coaching Nancy, keeping her as the focus of the problem, this consultant chose to help the organization as a whole, particularly the executive team, to reevaluate some of the more creative behaviors Nancy exhibited. Simultaneously, he coached Nancy on how to offer her ideas in ways that were more palatable. As a result, Nancy and the rest of the team were able to move beyond the previous, polarized dynamic and find mutually accommodating approaches. The consultant's attention to the whole system, coupled with his deftness in straddling the needs of all concerned, was an example of consulting mastery.

End

How Masterful Consultants Relate to Knowledge

While I have argued strongly against the overemphasis on knowledge in the hierarchy of consulting abilities, I am not dismissing it altogether. Indeed, a threshold of knowledge is necessary to be even a half decent consultant. The importance of knowledge was reinforced through the client interviews I conducted to understand their views of consulting mastery. When describing the most effective consultant they had ever worked with, many described how bright and knowledgeable the consultant was. Clients often spoke about not only the consultant's conceptual capability but also of his or her ability to see clearly through the fog of the client's difficulties. Similarly, the intellectual horsepower of each of the consultants I interviewed was quite evident. At the same time, none of them wore their intelligence on their sleeve. Quite the opposite; almost all were astoundingly humble.

Knowledge, then, is crucial to consulting mastery, as is the ability to think clearly. Without some threshold level of knowledge and a keen intellect, the consultant will not fulfill the client's tacit need to be given something (knowledge) the client believes it lacks.

However, brilliant thinking does not make a great consultant. Brilliant thinking may impress, but it doesn't empower the client to make changes. Instead, all of the masterful consultants interviewed displayed an impressive amount of emotional intelligence. Their ability to understand their clients from a human standpoint, to see client problems more clearly, to help them make sense of their own organization, and work with them to the point where true change occurs is what separates them from the pack. Most consultants have the requisite knowledge and analytic capability. Few have the emotional intelligence to produce lasting change in their client organizations.

In this day and age, both good and masterful consultants are more than adequately equipped with expert knowledge in their field, and are able to communicate their knowledge effectively. In the knowledge arena, what distinguishes masterful consultants is the way they hold and use knowledge. They hold their knowledge with certainty and confidence, not arrogance. When they communicate, they often describe the complex set of unfolding dynamics in ways that create clarity out of confusion. Most importantly, masterful consultants are guided by a set of theories about change, which provide a map for how to navigate the complex and choppy waters of change. One master consultant I interviewed said it well:

Too often consultants are walking around and they don't have a solid ground to stand on in terms of either a theory of change that they can use across multiple levels of system or a theory of phases of development. Without those two things, they are almost certainly going to end up basically leaning on tools and techniques.

In addition to offering concepts cleanly and simply, masterful consultants will pick and choose their spots when intervening into the client organization. Ever aware that the client must own the change and take action based on the knowledge offered, masterful consultants seek not to dazzle the client with knowledge. Instead, they guide and support the client toward the discoveries necessary for action. Even more important, they seek to create conditions in which these discoveries are so strongly experienced that the outcome is a profound commitment to change.

How Masterful Consultants Carry Themselves As People

The quality of character of masterful consultants is evident in how they talk, how they relate to others, and how they act. Behind these behaviors must be integrity, confidence, and humility. Behind this, deeper still, must be strong self-esteem, often borne of years of self-reflection and intense inner work.

In my experience, masterful consultants strive to live by a set of principles. We all have principles that guide our actions, sometimes tacit, and sometimes explicit. What distinguishes masterful consultants from others is their adherence to those principles, their commitment to examine themselves in relation to these principles, and their willingness and ability to self-correct. Ralph Waldo Emerson, the famous 19th century transcendentalist philosopher, put it well: "Self-command is the main discipline."

Not surprisingly, the principles of self-command are not typically taught in most consulting training courses. Nor are they discussed in great detail in daily conversation among consultants. But they are held deeply by masterful consultants. Here are the principles they share:

Sidebar

The Masterful Consultant's Principles of Conduct

1. Always tell the truth, at the deepest levels
2. Commit to learning—for self and for the client
3. Bring my whole self in full partnership
4. Play a big game

End

Always tell the truth. Be honest with one's self and with others at all times. Great consultants are typically courageous and value honesty before caution. At the same time, they find ways of speaking honestly in ways that others can hear. They do not bludgeon others with honesty. Instead, their honesty goes down easily because it is coupled with respect.

Commit to learning. Take a stance in life. Great consultants are inquisitive. They spend far more time and energy exploring issues than they do offering answers. They respect and abide by the process of discovering, and encourage answers to unfold, rather than delivering them in machine-gun succession.

Bring my whole self. Be vulnerable and be whole—mind, body, and spirit. Great consultants are acutely aware of their shadow self, and rather than deny or hide some areas of their self, they seek to bring them out. They see the process of consulting as a very human process and know that the more we know and respect our own self, the more we can understand, respect, and guide others.

Play a big game. Work with others to make a larger difference. Great consultants don't get embroiled in either/or thinking. They focus on ways of working that expand possibilities to produce win-win outcomes, and that open up vistas clients were not even aware of.

Simple as they may seem, these principles are profound in their implications. As I look back on the moments when I was less than successful, I can almost always trace them back to either avoiding or not embodying one of these principles. Masterful consultants know deep in their bones that failure in consulting is almost always attributable to violating one of those principles; therefore they strive to live by them impeccably—to be in command of self. Deviating from them creates an inner disturbance. Once they notice the deviation, they immediately correct course.

By saying that masterful consultants live by the principles I have described, I am not suggesting they are perfect. To the contrary, any principle or value is a beacon of light to strive for; not a rule to be gripped by. What differentiates masterful consultants from others is their commitment to the principles, their never-wavering intention to look themselves in the mirror, and their ability to self-correct without self-blame.

These qualities do not come easily. They are the result of years of self-exploration, self-examination, and the support of many others—therapists, counselors, coaches, mentors, friends, and family—all of whom challenge the consultant to live up to his or her full potential as a vehicle for positive change. It takes a strong sense of self—an unusually high level of self-esteem—to attain mastery, and it is driven by a continual commitment to self-awareness.

Underlying the four principles of conduct is a deeper awareness held by all masterful consultants. Masterful consultants do not see these principles as static. Nor do they see themselves as perfect. They see themselves on a journey toward fully realizing these principles, a destination that is never fully achieved. This is a journey toward being a more conscious and self-aware human being, and not just a good consultant. It is a journey of self-discovery.

In short, these principles are a guide for how masterful consultants conduct themselves, always. The principles determine the consultants' actions, decisions, and choices. It is their powerful inner guide, and in living by this guide, consultants become effective, trusted, and positively influential.

Figure 2. The Master Consultant's Model (fax)

The Three Strategies Are An Integrated Whole

As a system, the goals and strategies of masterful consultants do not exist in isolation from one another. Trying to enact one strategy without the others is like a three-legged stool missing a leg. Inevitably, it will fall.

To illustrate, let's look at three examples. I know one consultant (let's call him Paul) who is quite brilliant, and who has conceptualized a way of working with clients and helping them transform that is as well thought out as any I've ever seen. Paul also acts with the utmost of integrity. However, when he works with clients, they often feel that he is aloof, professorial, and sometimes self-absorbed. Paul has generated many new clients, but few stay with him over time. Fewer still call him back for more work. They rarely tell him the real reason for not continuing to work, masking it with excuses such as, "we aren't ready to go forward yet," or "we want to slow the process down for now." As a result, Paul has no clue why his client work comes up short. His relationship to knowledge is strong and his character impeccable. But his ability to connect to people in a heartfelt way just isn't there.

In contrast, I know another consultant (call her Sandy) who demonstrates enormous integrity in her dealings with others. Sandy has a wonderful way of engaging with clients, and they experience her as warm, caring, and appropriately empowering. Nonetheless, her Achilles heel appears to be her ability to communicate her ideas clearly. While she is bright, having earned a doctoral degree, she often speaks in a way that meanders or is verbose, and often obfuscates her key points. As hard as Sandy tries, clients are often left confused. This is particularly problematic in that one reason an organization hires consultants is to help them better deal with their own uncertainty and confusion. Sandy's ability to relate effectively is clearly without question, and her integrity beyond reproach. But her relationship to knowledge is flawed. Consequently, she has difficulty obtaining work, and when working, sometimes has difficulty helping clients move in a clear, coordinated way.

Finally, I know a third consultant (Greg) who is clear thinking, holds knowledge in a way that supports clients and their learning, and establishes a strong partnership with them, yet his integrity is suspect. Frequently, Greg unconsciously acts in a self-serving manner. His need for work sometimes causes him to be too aggressive with clients, so that he comes across like a used car salesman. Greg sometimes "shapes the truth" to get what he wants. In other words, his character is compromised. As a result, clients often end up not trusting him, to the point of severing their work with him.

There are endless examples of consultants whose imbalance or inadequate capability in one of these fundamental arenas compromises their consulting effectiveness. In contrast, while all the masterful consultants I interviewed appear to have a particular strength, none of them are weak in anyone of the arenas. They have worked hard to develop all three, and recognize them all as crucial to their consulting success.

The Lifelong Journey Toward Mastery

In the final analysis, mastery is not a destination, nor is it a thing one does. Instead it is a journey of a lifetime that knows no ending point. While the ideas and examples in this article point the way, the best way to develop mastery is to develop one's inner stance. This, by its very nature, is through a lifelong journey of self-exploration, self-awareness, and self-discovery. Many spiritual traditions and psycho-emotional practice offer guidance toward self-mastery and there is no substitute for on going inner work. All of them operate from the basic premise that our inner stance guides our thoughts, and from our thoughts, all else follows.

The thought manifests as the word;
The word manifests as the deed;
The deed develops into habit;
And the habit hardens into character;
So watch the thought and its ways with care;
And let it spring from love
Born out of concern for all beings.

As the shadow follows the body,
As we think, so we become.

From the *Dhammapada* (the sayings of
the Buddha)

All of the masterful consultants I know have been on the journey for a long time. They know that the source of their effectiveness and the deepening of their self-awareness are one and the same. They have each engaged in activities, practices, and disciplines designed to examine their thoughts, feelings, and beliefs and find ways of being in the world that is more resourceful, capable and ultimately satisfying.

¹ Adapted with permission from *Consulting Mastery: How the Best Make the Biggest Difference*. Berrett-Koehler Publishers, July 2005, \$34.95. To order the book, visit www.bkconnection.com or call 800-929-2929.

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