

How to be Phenomenal Consultants

The first step is to remember to step into the role of “consultant” so that you can focus on listening for the real problem that needs to be solved. Often, our clients come to us having already engaged in a diagnostic process and they have likely identified what they think is a good solution.

To establish rapport, you’ll want them to feel that you are truly listening to them. This means that you may need to artfully validate the work they have already done and gently invite yourself to explore further with them, so that you can design the best solution possible.

“Is it OK if I ask you a few questions? This will help me design the best solution for you.”

What

“I want to make sure I fully understand the problem. You said ...” (Summarize what you heard)
“Is that correct?” (Listen for new details)

“What is currently happening that is not working?” Or
“Tell me more about what is happening now.” (Listen for natural follow-up questions)

Envision that the client is painting you a picture and if a portion of the image is fuzzy or missing details, ask them about it. You should feel that you are seeing exactly what they are seeing.

Who

Next, focus in on the who. These questions can be really powerful for honing in on some important insights.

“Is the whole group involved?” or *“Who, specifically, is involved with this issue?”*
(Listen for natural follow-up questions)

“Do you see any differences between...” (Based on what you have heard, choose some of the relevant pairings below that might tease out important issues)

- New hires and experienced employees
- On-site and remote employees
- Job levels/titles
- Team A and Team B
- Groupings that might indicate unconscious bias or diversity/inclusion (gender, race, ethnicity, age, assertiveness, size, etc.)

**Ideal
State &
The Gap**

Now, turn to what the outcome is. Focus in on what ideal state or optimal performance looks like.

“What would it look like if everyone was performing optimally?”

“How would you measure this? What metrics could you use?”

“What are the words you would hear and the actions you would see if people were performing optimally? What is in the way of them performing this way now?”

“Is anyone already performing optimally/doing an outstanding job at this?”

“What are they doing differently than the rest of the group? Do they have different (knowledge, skills, motivation, resources, experience, capacity environment)?”

Solutions

“Based on what we have discussed so far, do you have any new perspectives or ideas about the situation and how to solve it?”

“What do we still need to learn to design the best solution possible?”

“Are there any assumptions we need to test or data we need to gather to gain more clarity?”

“Based on how your team works, what length of training would be best?”

“Is there a time of day or week that will be most effective?”

“What learning format would be most accessible?” (Offer relevant options like self-paced, instructor-led, remote access, etc.)

“If our success was completely guaranteed, what bold steps might we choose?”

Action

Wrap up the consultation by summarizing the highlights of what you have heard so far.

“So, what I have noted is ABC. Is that correct? Would you add anything?”

“What needs our immediate attention going forward?”

“What are our next steps? What contribution will we each make and by when?”

“What possible challenges/roadblocks might arise and how might we meet them?”

Once you conclude the meeting, I recommend sending a quick email summarizing the highlights and action plan. As you use this process, you will get smoother at it. In addition, your client will start to learn the process and will likely come to you earlier and ready to engage in the exchange.