

Learn-to-Serve: Increasing Client Engagement for Lasting Change



oeCONSULTING
where possibilities grow

October 6, 2011

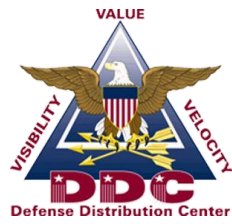
Welcome & Introduction

- ❖ Over 17 years of professional experience working with clients from the private, public, and nonprofit sectors – including almost 11 years with Booz Allen Hamilton
- ❖ Recognized for helping clients facilitate individual and organizational transformation – launching independent consulting firm, Organization Effectiveness (OE) Consulting, in March 2008
- ❖ Served as an adjunct faculty member with George Mason University – and, has been adjunct faculty with Institute of Public Service at Seattle University since 2006
- ❖ Prior to joining the Albers School of Business and Economics in Fall 2009, served as core faculty with the Organization Systems Renewal (OSR) graduate program at Seattle University
- ❖ Served as a Lecturer with the University of Washington, Evans School of Public Affairs – teaching in both the traditional and Executive MPA programs as well as the Cascade Executive Management Series





ZURICH



Internal Revenue Service



Learn-to-Serve: Increasing Client Engagement for Lasting Change

Session Design: Experiential Learning Model



Setting the Context for Learning about Engagement

Reflect on a time in your life when you were motivated to participate or engage in an activity, learning experience, volunteer event, or work setting. Take a moment to think about –

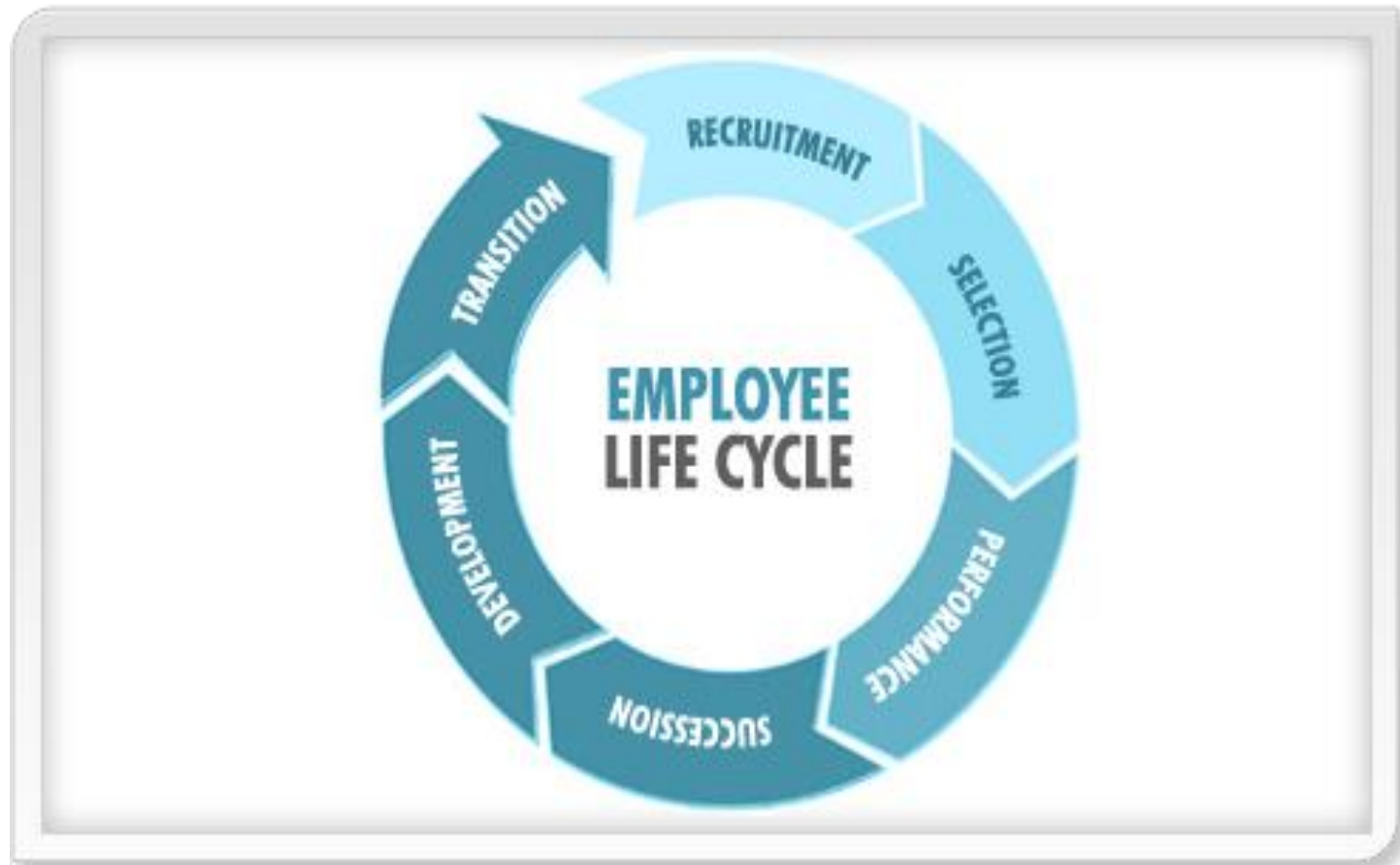
- ❖ Why did you elect to engage in the activity?
- ❖ What kept you engaged?
- ❖ When did you decide to disengage? What would have helped you to stay engaged?
- ❖ What were your lasting impressions of the experience? What made it memorable?

Engagement & the Client-Consultant Relationship

“The personal interaction between the consultant and the client during the initial contracting meeting is an accurate predictor of how the project itself will proceed.”

-- Peter Block, *Flawless Consulting* (2011)

The Socialization-Performance Connection



Process Consultation Defined (Schein, 1999)

Edgar Schein (1999) described process consultation (PC) as the relationship between “...a helper and the person or group being helped” in his well-known book entitled, *Process Consultation Revisited: Building the Helping Relationship*. Schein emphasized “process” because he believed that how things are done between people and in groups is as – or more important than – what is done.

Process Consultation is the creation of a relationship with the client that permits the client to perceive, understand, and act on the process events that occur in the client’s internal and external environment in order to improve the situation as defined by the client.

Schein, E. H. (1999). *Process consultation revisited: Building the helping relationship*. Reading, MA: Addison-Wesley.

10 Principles of Process Consultation (Schein, 1999)

Ten general principles of PC that Schein suggests should be considered in the client-consultant relationship are:

1. Always try to be helpful.
2. Always stay in touch with your current reality.
3. Access your ignorance.
4. Everything you do is an intervention.
- 5. It is the client who owns the problem and the solution.**
6. Go with the flow.
7. Timing is crucial.
8. Be constructively opportunistic with confrontive interventions.
9. Everything is data; errors are inevitable – learn from them.
10. When in doubt, share the problem.

Schein, E. H. (1999). *Process consultation revisited: Building the helping relationship*. Reading, MA: Addison-Wesley.

Principle 5: It is the client who owns the problem and the solution

My job is to create a relationship in which the client can get help. It is not my job to take the client's problems onto my own shoulders, nor is it my job to offer advice and solutions for situations in which I do not live myself. The reality is that only the client has to live with the consequences of the problem and the solution, so I must not take the monkey off the client's back.

Schein, E. H. (1999). *Process consultation revisited: Building the helping relationship*. Reading, MA: Addison-Wesley.

Establishing a Client-Centered Partnership (Merran, 2006)

- **Master consultants develop a client-centered partnership.**
 - They see clients as whole systems and encourage their clients to do the same.
 - They are clear that clients have the capacity to grow.
 - 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.
- **Master consultants share knowledge openly and freely.**
 - They know that the key to effectiveness is in applying knowledge in real time.
 - In addition, they know wherever possible to transfer knowledge and enhance the wisdom of their clients.
- **Master consultants see the quality of their character as a catalyst for transformation and learning.**
 - They 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.

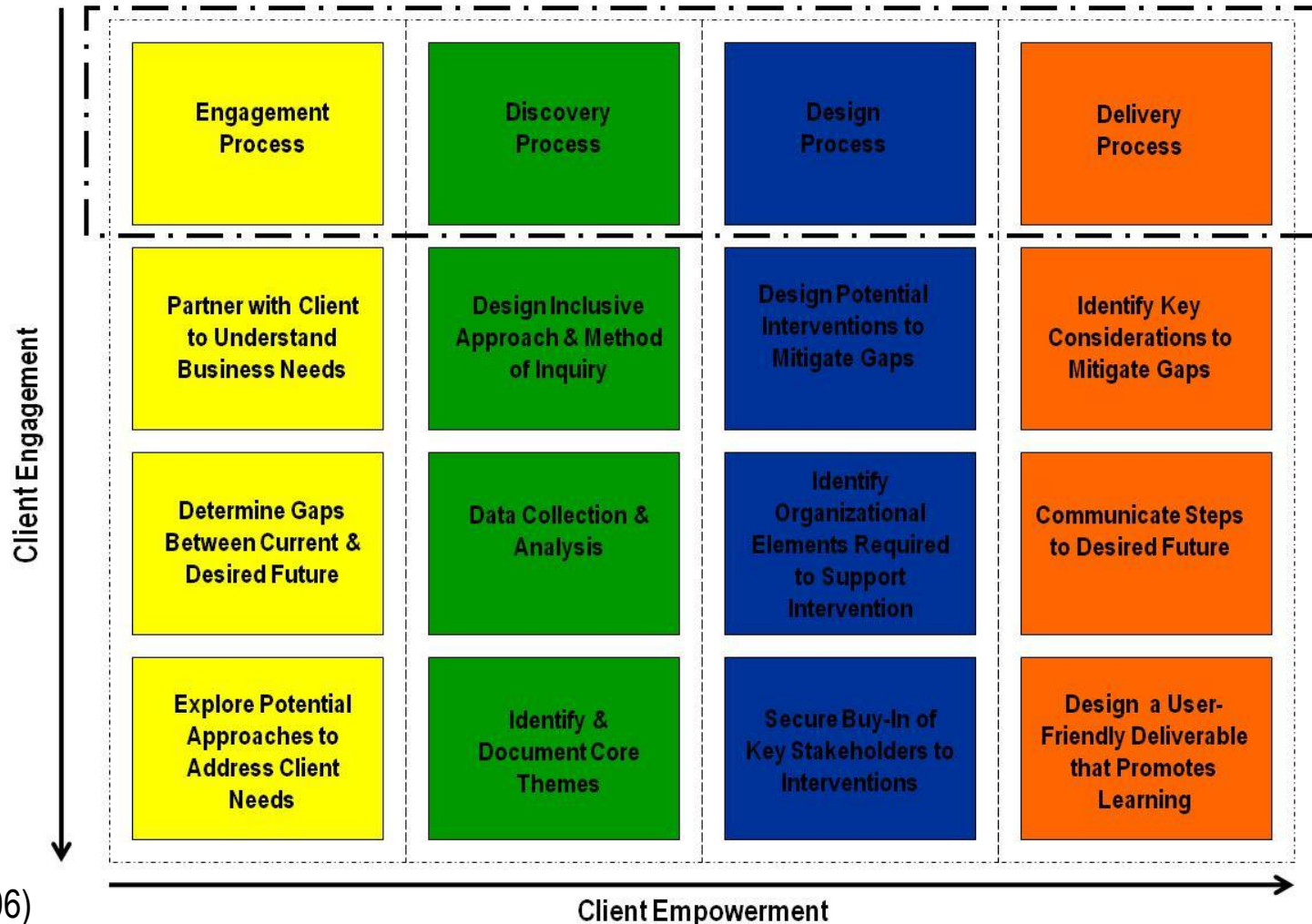
Trust: The Precursor to Success

The following behaviors will make your volunteer experience a success.

1. Be a patient listener/learner and do not jump to conclusions.
2. Be honest about what you can do and by when you will have it done. Always do a little more than you promise.
3. Don't say anything to or about your clients that you wouldn't want passed around.
4. Speak the client's language. Don't force them to learn yours.
5. Pass your knowledge and experiences on to others. Share, coach and advance the abilities of others.
6. Respect the strengths and accomplishments of the organization.
7. Communicate with team members, 501 Commons, and the client more than you think is necessary.
8. Focus on the client's future results, not your past experiences or accomplishments.
9. Keep aware of the relationships and interdependencies between the project tasks. Ensure that what you're doing is what the client is paying for.
10. Keep learning and sharing new and better ways of getting things done.

501 Commons Consultant Guide, page 1, 2010

Engage + Empower = Learning in Organizations



(Franklin, 2006)

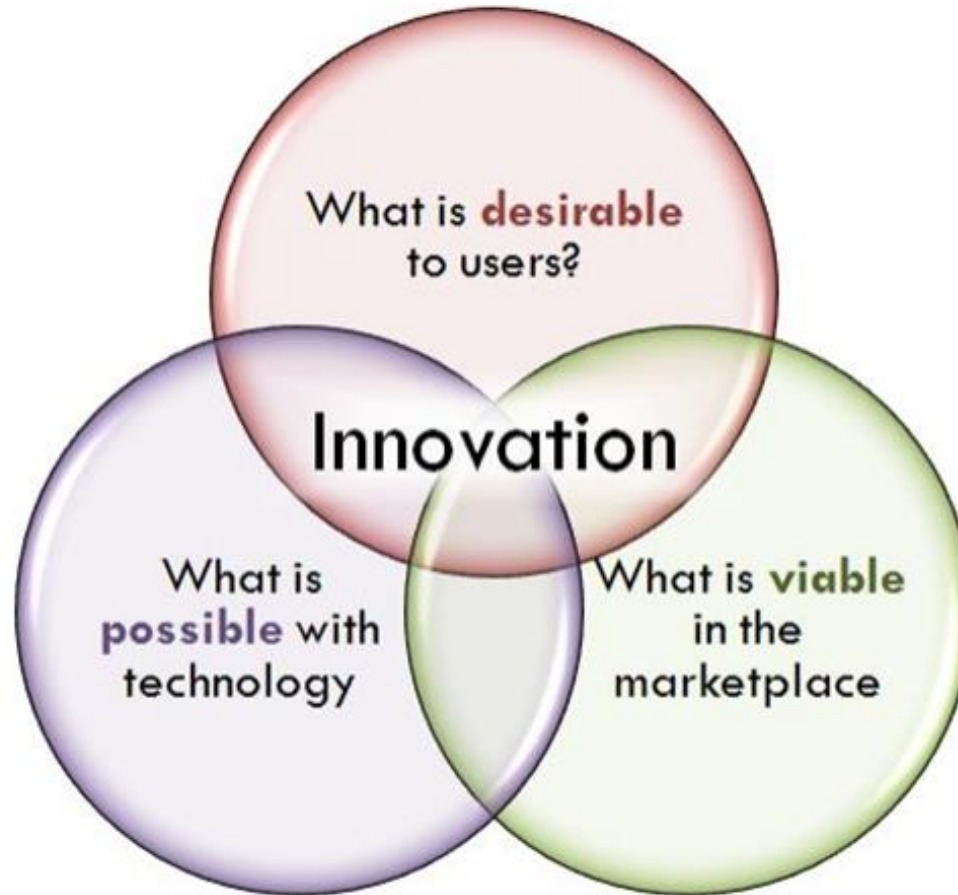
Learner-Centered Instruction: Increasing Student Engagement



Learner-Centered Psychological Principles

- (a) include learners in decisions about how and what they learn and how that learning is assessed;
- (b) value each learner's unique perspectives;
- (c) respect and accommodate individual differences in learners' backgrounds, interests, abilities, and experiences; and
- (d) treat learners as co-creators and partners in the teaching and learning process.

Human-Centered Design: Where Innovation Grows



Human-Centered Design Toolkit for Social Change



“THE KIT OFFERS NEW TOOLS AND TECHNIQUES TO ENSURE THAT FARMERS’ NEEDS ARE AT THE HEART OF DESIGN.”

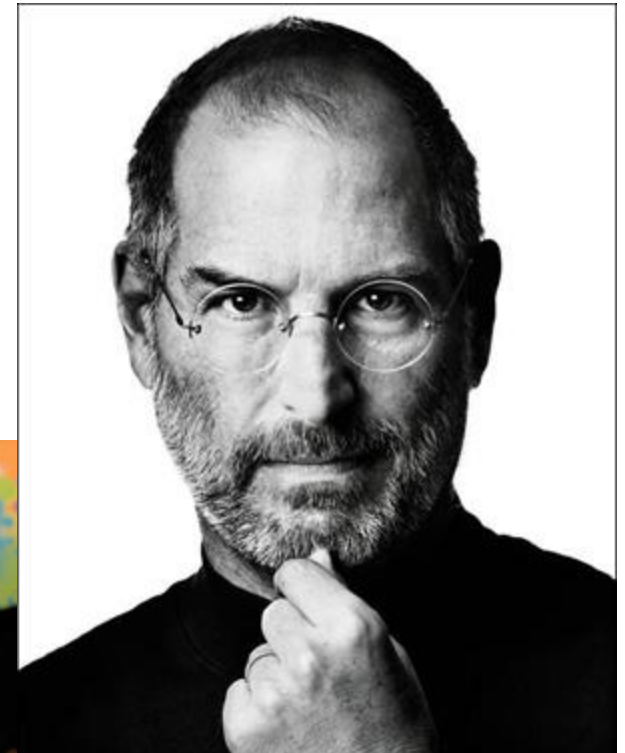
-- The Bill & Melinda Gates Foundation

A free innovation guide for social enterprises and NGOs worldwide

Client-Centered Engagement Includes Imagining Possibilities

*"If I had asked people what they wanted,
they would have said faster horses."*

-- Henry Ford

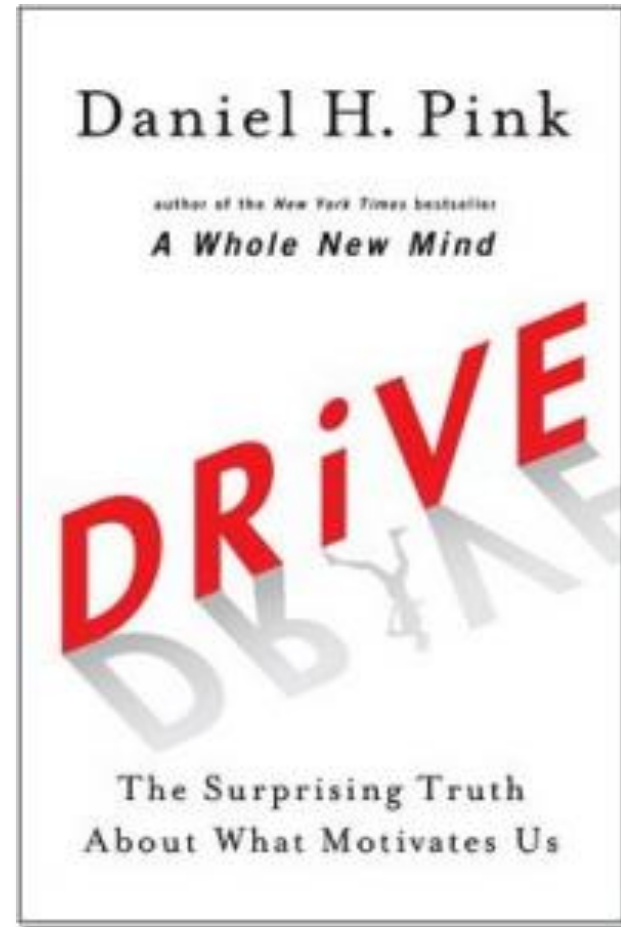


Motivation = The Root of Engagement

AUTONOMY

MASTERY

PURPOSE



Intrinsic Motivation



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Extrinsic Motivation



The Whole-Person Paradigm

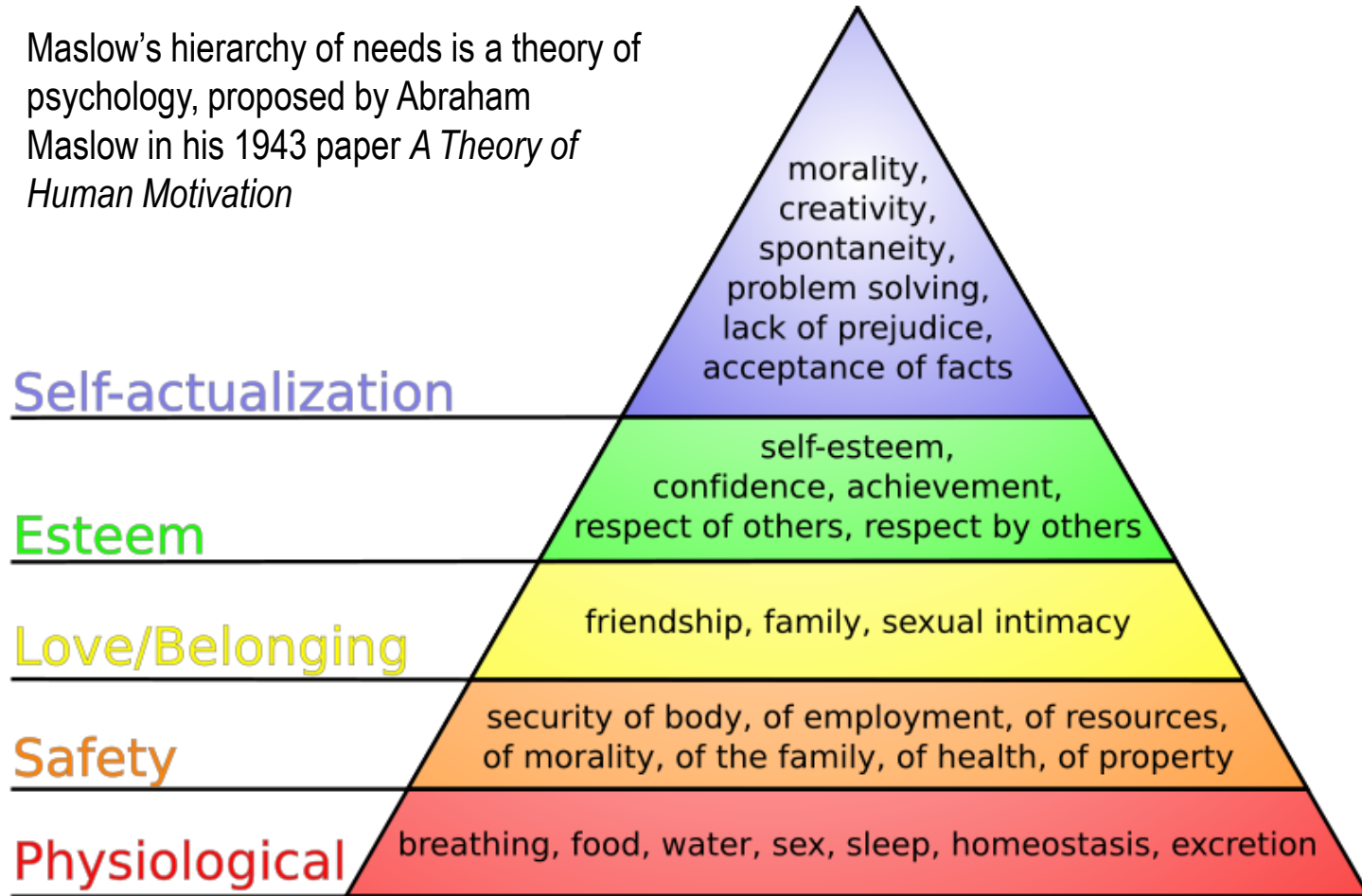


Paradigm	Goal
Mind = To Learn	Growth & Development
Body = To Live	Survival
Heart = To Love	Relationships
Spirit = To Leave a Legacy	Meaning & Contribution

“At the core, there is one simple, overarching reason why so many people remain unsatisfied in their work and why most organizations fail to draw out the greatest talent, ingenuity, and creativity of their people and never become truly great, enduring organizations. It stems from an incomplete paradigm of who we are – our fundamental view of human nature.” – Stephen R. Covey

Abraham Maslow: Hierarchy of Needs

Maslow's hierarchy of needs is a theory of psychology, proposed by Abraham Maslow in his 1943 paper *A Theory of Human Motivation*



Psychological Sense of Community

Elements	Attributes
Membership	Boundaries Emotional Safety A Sense of Belonging and Identification A Common Symbol System
Influence	Members must feel empowered to have influence over the group
Integration and Fulfillment of Needs	Interdependence with others; person-environment fit; individuals feel valued
Shared Emotional Connection	Shared history and greater personal interaction

McMillan & Chavis, 1996

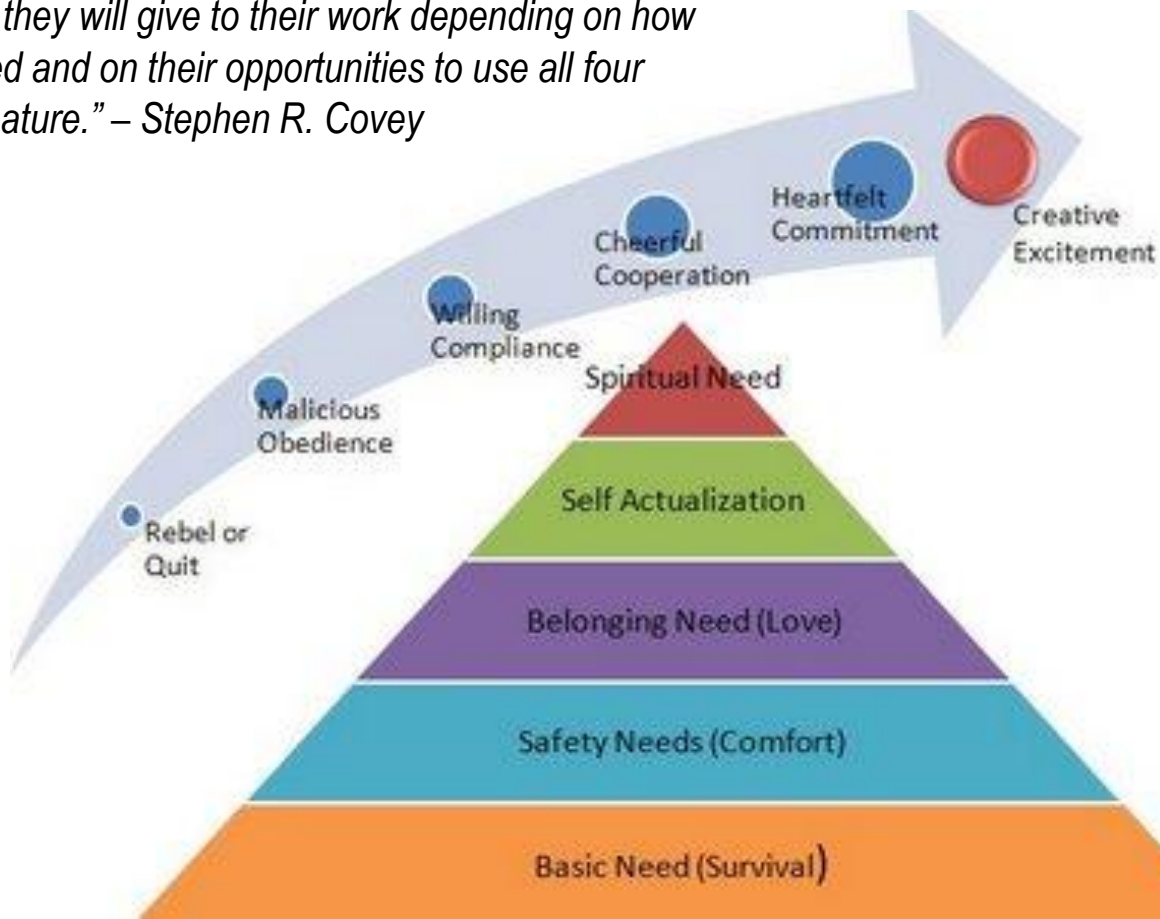
Internal Commitment Promotes Engagement

How Commitment Differs	
External Commitment	Internal Commitment
Tasks are defined by others.	Individuals define tasks.
The behavior required to perform tasks is defined by others.	Individuals define the behavior required to perform tasks.
Performance goals are defined by management.	Management and individuals jointly define performance goals that are challenging for the individual.
The importance of the goals is defined by others.	Individuals define the importance of the goal.

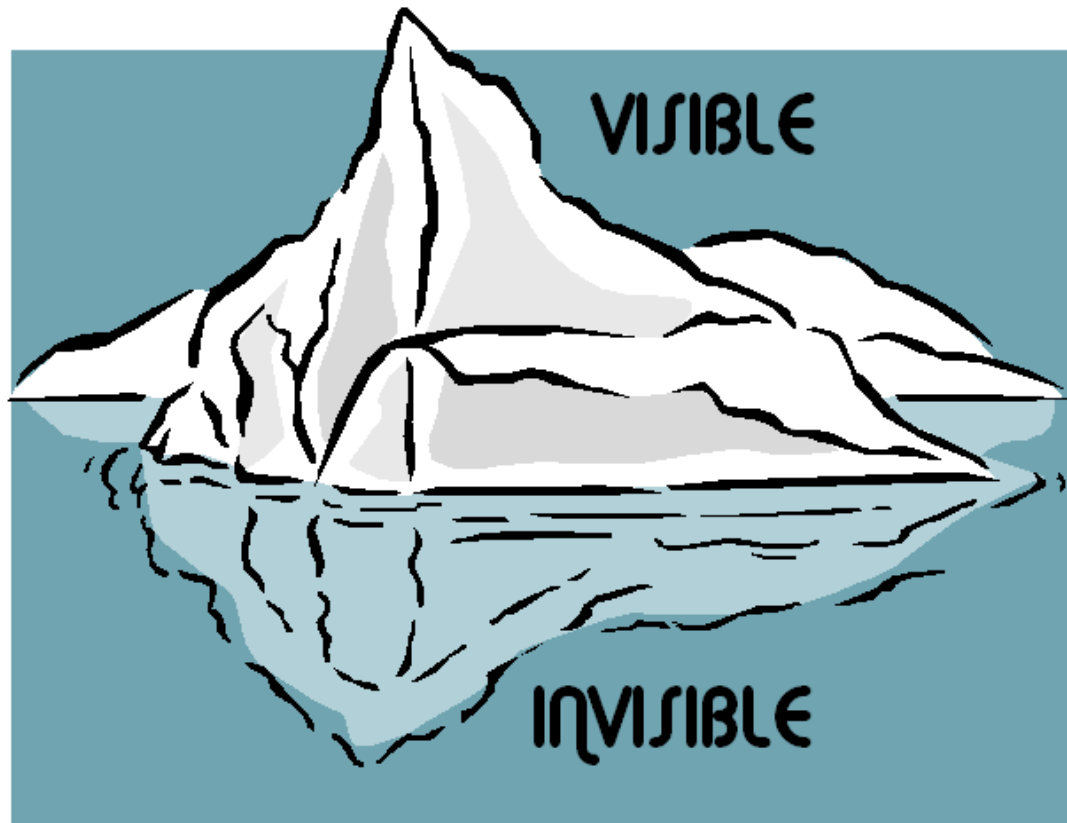
Argyris, C. (1998). Empowerment: The emperor's new clothes. *Harvard Business Review*, May-June, pp. 98-105.

Motivation & Choices

“Consciously or subconsciously, people decide how much of themselves they will give to their work depending on how they are treated and on their opportunities to use all four parts of their nature.” – Stephen R. Covey

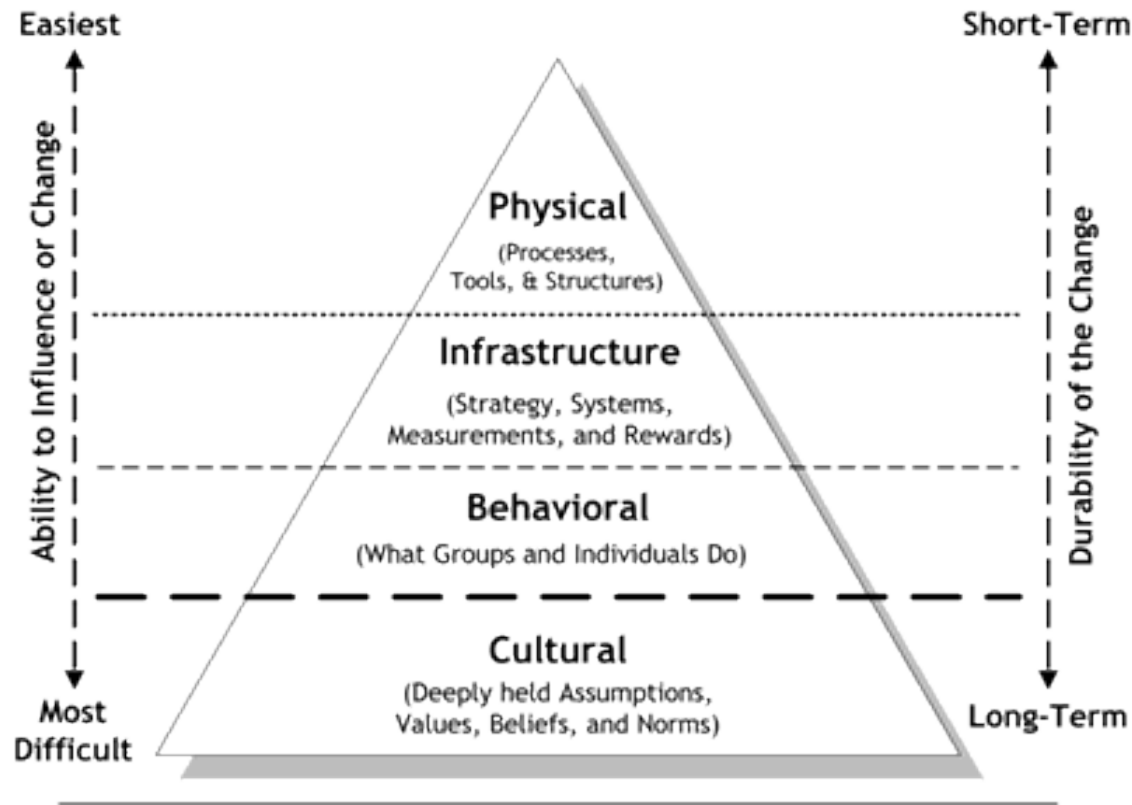


Low Engagement = May Be Symptom of Systemic Issues



Low Engagement = Short-Term Change

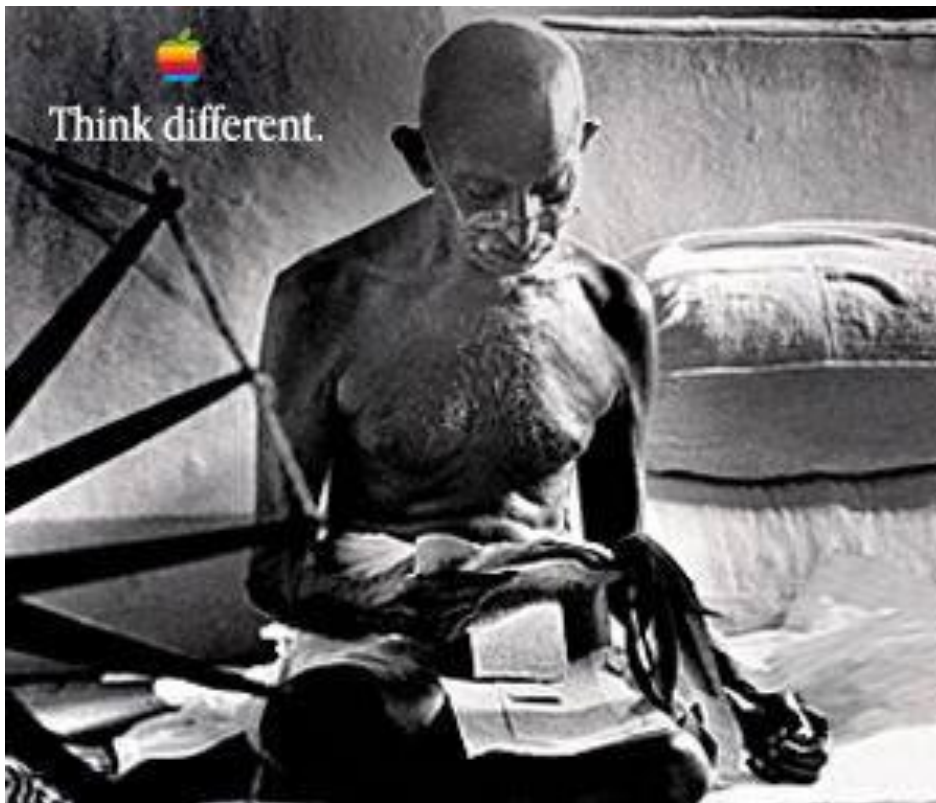
The Infrastructure of Every Organization



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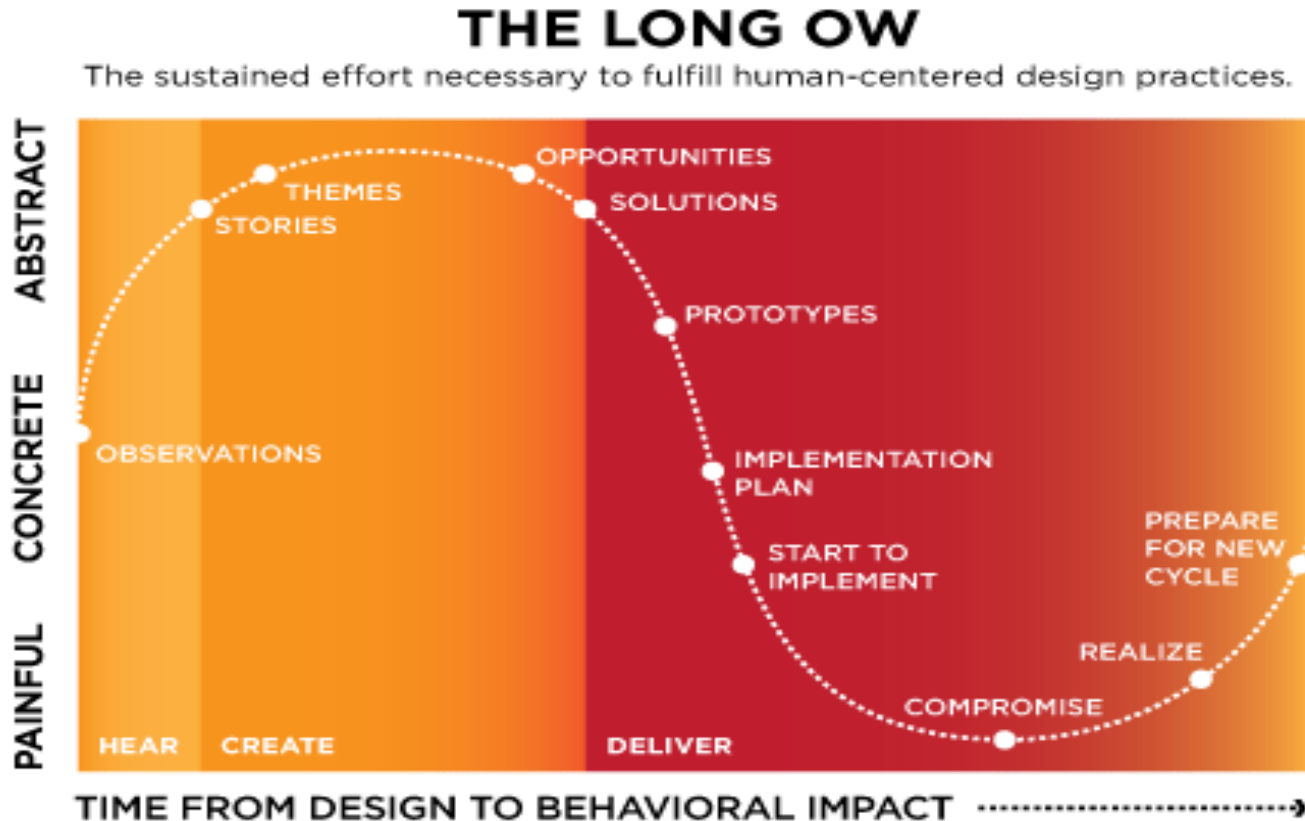
Value of Collective Intelligences

Diversity: The Art of Thinking Independently Together.



-- Malcolm Forbes

Engagement Take Time...and, Sustains Change



DAVID SHERWIN | CHANGEORDER.TYPEPAD.COM

Portions of this chart adapted from IDEO's Human Centered Design Toolkit, 2nd Edition. ©2009 IDEO

Tip #1: Be Present & Listen

The main tools of deeply listening are...

1. Inquiry into the breadth and historical depth of any organizational issue presented;
2. Empathy, or the ability to identify with or imagine oneself as the other person or group;
3. Efforts to help organizational members feel understood (both by the consultant and by one another);
4. Creation of a safe space, a holding environment or container in which emotion-laden group issues may be explored; and
5. Sparing use of confrontation and interpretation by the consultant or group facilitator.

-- Howard F. Stein, *Listening Deeply: An Approach to Understanding and Consulting in Organizational Culture* (1994)

Tip #2: Create a Learning Partnership

Consultant teams benefit from clients who...

- Are actively engaged throughout the duration of the project
- Create a partnership climate – and, are open to new and emerging ideas
- Mentor/coach consultant team on the unique aspects of the organization/industry
- Offer thoughtful feedback in the spirit of learning
- Provide clear guidance – and, understand that learning is the ultimate objective of the experience

Equally, client systems benefit from consultant teams who...

- Aim to be the best stewards of the client system
- Demonstrate respect for every person, at every level, in the client system
- Build a collaborative client-consultant relationship where knowledge is regularly shared
- Keep the client well informed of the team's progress – and, manage project scope and deliverable expectations throughout the engagement
- Remain curious and open to learning at all times


Tip #3: Engage the 'Whole'



Tip #4: Empower through Responsibility

WHAT			
Overall Description			
Rationale			
WHO			
Team Involvement	Sponsors	Agents	Targets
HOW			
Tactical Actions and Activities			

Tip #5: Communicate Progress & Celebrate Successes



Medisys Engagement Status Report
23 December 2010

Project Description Medisys 2011 Strategic Leadership Summit (SLS)

Period of Performance 2 December through 23 December 2010

Activities Performed

- Participated in five (5) Avanade internal project meetings related to approach, strategy, and desired outcomes of Medisys opportunity
- Conducted kick-off meeting with Medisys and Avanade project sponsors
- Conducted internal Avanade project team kick-off meeting
- Participated in three (3) meetings with Avanade HLS Industry Director
- Participated in weekly status calls with Medisys and Avanade project sponsors
- Delivered weekly status report to Medisys executive project sponsor
- Delivered monthly status report to Avanade project sponsor
- Delivered executive communications for Medisys executive project sponsor (sent to Medisys SLS participants on schedule the week of December 13th)
- Delivered pre-Summit survey for Medisys SLS participants (sent on schedule the week of December 20th)
- Developed draft SLS purpose, outcomes and high-level design for Medisys executive project sponsor
- Began the design of interview questions for Medisys SLS participants

Issues

- Statement of Work (SOW) – Draft submitted by Consultant to Client on 23 December 2010
- Contract – HST number and Canadian work permit outstanding
- See Resources Requested below

Activities Planned

- Participate in Medisys corporate overview session (planned for January 5, 2011)
- Finalize SLS participant interview guide
- Conduct SLS participant interviews
- Develop pre-SLS survey results summary
- Participate in Avanade project team pre-SLS activities
- Complete SLS design
- Facilitate SLS
- Review the post-SLS information technology roadmap developed by the Avanade project team, as appropriate
- Engage in ongoing communication with Medisys executive project sponsor
- Engage in ongoing communication with Avanade project sponsor and HLS Industry Director
- Participate in weekly status meetings with Medisys executive project sponsor

Resources Requested

- Identify Avanade project team
- Identify Avanade administrative support responsible for coordination of SLS logistics (logistics to be finalized no later than 14 January 2011)

Key Activities Schedule:

KEY ACTIVITIES SCHEDULE		
KEY ACTIVITIES	SCHEDULED	STATUS
Executive Communication (Medisys)	Week of 12.13.10	Complete
Data Collection Launch (Medisys)	Week of 12.20.10	Complete
Avanade Project Team Confirmed	Week of 12.20.10	Incomplete
Medisys Corporate Overview	01.05.11	Scheduled
Avanade Inputs for SLS	Week of 01.17.11	Inputs Undefined
Data Collection Deadline (Medisys)	01.07.10	Pending
Interview Executives (Medisys)	Week of 01.10.11	Scheduled
Avanade-Medisys Workshop Prep	Week of 01.17.11	Pending
Conduct Workshops (Medisys)	Week of 01.24.11	Scheduled
Avanade-Medisys After-Action and Roadmap Report Prep	Weeks of 01.31.11 and 02.07.11	Pending
After-Action and Roadmap Report	02.14.11	Pending

Project Hours:

The following table reflects the estimated number of hours required per project activity and the number of hours used to-date for each activity.

Status of Project Hours		
Task	Estimated Total Hours	Total Hours Used To-Date
Program leadership activities	20	10
Development of executive communication, SLS survey, and survey results briefing	50	25
Conduct executive interviews	16	0
Activities related to summit design	72	5
Facilitation and consultative leadership	24	0
Post-SLS support	24	0
Total Hours	206	40

Tip #6: Pay It Forward

*Give a man a fish and you feed him for day.
Teach a man to fish and you feed him for a lifetime.*

Conversation & Reflections



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where possibilities grow

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