



The Consultative Process

Technical professionals, project managers, and project supervisors will be more effective in supporting the needs of the client and their organization if they act as both technical experts and consultants. They will focus on client communications and business problem-solving skills that will lead to more productive client relationships and solutions.

The Consultative Process introduces a problem-solving mindset and presents an effective process for consulting with both internal and external clients. It helps technical professionals become comfortable in their role as consultant and helps them generate greater alignment and commitment with the organization's clients by using a win/win problem-solving approach.

The Consultative Process examines a business relationship from the client's viewpoint and addresses the four NOs that restrain the client from willingly engaging in the recommended solution, service, or product. The four NOs include: No Trust, No Need, No Help, No Satisfaction.

Knowing how to effectively address each of the four NOs means the difference between a successful relationship and an ineffective interaction.

Programme Overview

The Consultative Process is a three-day program comprised of five units. The first unit, the Counsellor Approach, introduces the problem-solving mindset and presents an overview of the consulting process. Each subsequent unit covers the concepts and skills of each phase of the consulting process.

The Counsellor Approach

- ▶ Become aware of a process for increasing consulting competence.
- ▶ Approach clients with a problem-solving mindset.
- ▶ Learn the four phases of the consultative process and understand the obstacles that typically accompany each phase.

Relating

- ▶ Understand the barrier of No Trust and how relating can address it.
- ▶ Initiate the consultative process in a way that communicates empathy and understanding.
- ▶ Learn how to build credibility with clients throughout the consulting process.

Discovering

- ▶ Recognize client behaviour that indicates a feeling of No Need.
- ▶ Understand the client's problem as the difference between the Have and Want sides of the Gap Model.
- ▶ Use questioning and listening skills to gather information about the client's problem.
- ▶ Understand and use the Discovery Agreement to summarize the client's problem.

Advocating

- ▶ Understand and recognize the barrier of No Help.
- ▶ Recommend solutions in terms of benefits to the client.
- ▶ Use task and personal appeals to communicate how the solution solves the client's problem.
- ▶ Ask for agreement to the solution.

Supporting

- ▶ Understand the barrier of No Satisfaction.
- ▶ Appreciate the difference in expectations between clients and the consultant after the solution has been determined.
- ▶ Understand the four skills that support the solution: Supporting the Decision to Act, Managing the Implementation, Dealing with Dissatisfaction, Enhancing the Relationship.

Audience

The Consultative Process focuses on skills and tools that are for both internal and external consultants. Technical experts (e.g., accounting, information services, human resources, business strategy, and other professional personnel) require consulting skills as they interact with clients on complex engagements.

Consultative skills are also a core competency for employees who function as internal consultants. These include project managers and information services, finance, engineering, human resources, and management professionals. These and other technical experts and professionals are making a shift from a corporate control role to a business consulting role. This program helps them approach their new role in a way that adds value for the enterprise and the client.

Programme Details

Session Length - 3 days

Participant Materials - Participant guide