



CONSULTANTS
DEVELOPMENT
INSTITUTE

Assessment of Your Knowledge of Principles in Organizational Consulting

Description

A consultant is anyone in a role to help a person, process, team or organization to change, but who has no direct authority to make that change happen. Thus, a consultant might be an advisor, trainer, facilitator, coach or mentor.

CDI's foundational, online Series "Principles in Organizational Consulting" is for any professional or leader who wants a clear and practical understanding of the "big picture" – of the system – of organizations, including the various functions within them and how they fit together, for example, Boards, strategic planning and finances. It is for those who seek to understand the core principles in changing teams and organizations to enhance their alignment and performance. It is for those who want to appreciate current major trends in organizations, leadership, management and consulting – and how those trends create problems and yet offer opportunities for organizations and professionals.

This assessment covers many of the highlights of the content in this Series – enough to give you a useful impression of the breadth and depth of the Series in order to help you decide whether the Series would be valuable to you. You can also choose to earn a "Certificate in Principles in Organizational Consulting". You can enroll from <http://ConsultantsDevelopmentInstitute.org>. See the link "Certificates" at the bottom of the page. If you have any questions, please email us at info@ConsultantsDevelopmentInstitute.org. Thank you!

Grasping the Big Picture in Organizations

(This course describes how to understand and analyze an organization and also the various major functions within it. The course does not specify the step-by-step consulting process needed to successfully change the organization. That process is described in CDI's Series "Collaborative Consulting Training".)

1. What does the "people side" of an organization mean? What about the "business side"? Why is it important for an organizational consultant to focus on both sides?
2. What are at least three parts of any system? What are at least three examples of systems?
3. What is a systems perspective on an organization or on any recurring function (subsystem) in an organization, for example, on marketing or financial management? What are at least three benefits of using that perspective when analyzing an organization or subsystem?
4. What is an open systems perspective? What are at least three benefits of using an open systems perspective when analyzing an organization?
5. What is the difference between outputs from a system versus outcomes from a system? Why is it important to know the difference when analyzing any system, for example, a function in an organization, such as business planning or product development?
6. What is the missing system-related term in the following sentence: "A very healthy system is constantly sharing _____ among its parts"?
7. What is a "closed system"? What is the primary disadvantage of a closed system?
8. Why is it important to use a team (including the consultant, client and employees) when analyzing a system?

9. When considering the parts, or features, of any system, in what order of the following should you analyze the system: inputs, outputs, processes and outcomes?
10. What is a logic model and how is it beneficial when analyzing any system or subsystem, for example, sales or staffing?
11. How can a logic model be used to form a simple “chain” of inputs and outputs when analyzing a set of functions, or subsystems?
12. What is the general alignment of the activities in the following four functions (or subsystems), that is, how are they typically integrated: a) output from the Board of Directors, b) input to financial management, c) input to strategic planning and d) input to marketing?
13. What is an organizational diagnostic model? What are at least three examples of that kind of model?
14. Which of the following is the most important aspect of doing an organizational analysis: using the right tool, using the right tool in the right way, or the discussions among participants when using the tool?
15. All systems have a mission, whether implicit or explicit. What is a mission and why is it important to know it when analyzing a system? Some social systems (systems of individuals) establish a vision – what is a vision and why is it important to know it when analyzing? Some social systems specify certain values – what are values and why is it important to know them when analyzing the system?
16. What are the primary outcomes of the function (or subsystem) of strategic planning in an organization or major department in an organization? Why should an organizational consultant be familiar with the organization’s Strategic Plan?
17. The driving force, or engine, in a system is the leadership of the system. What are at least four different domains, or areas of focus, of leadership in an organization? Which of these domains is the most important?
18. What are at least two different styles of leadership? Which style is most useful when facilitating major change in an organization?
19. What does the term “culture” mean in a social system? Why is it important to change the culture if long-lasting, successful change is to be accomplished?
20. What are at least three typical stages of development in a social system? Why is it important for an organizational consultant to know those stages and the strategies needed to evolve through the stages?

It's All About Performance in Organizations

(This course describes the role of performance and how to always focus on performance when analyzing or changing a system. The course does not specify the step-by-step consulting process needed to change the organization to enhance its performance. That process is described in CDI’s Series “Collaborative Consulting Training”.)

1. In the context of a social system, what does “performance” mean? Why is a focus on performance so critically important today?
2. What might performance mean in each of the following subsystems: job? team? financial management? research and development? sales?
3. What is a performance management process, for example, of an organization, a consulting project, or an employee’s performance?
4. How is a performance management process operating in a systematic manner?

5. Which of the following is the most important role of a performance management process: produce specific measurable, produce a sound conclusion about performance, or provide a consistent frame of reference (of language) when discussing the performance?
6. What are at least three benefits of working from a performance management perspective, whether a person is leading in an organization or leading a consulting project in an organization?
7. What are some of the typical activities in the performance planning phase of performance management?
8. What are some of the typical activities in performance assessment phase of performance management?
9. What are some of the typical activities in the development planning phase of performance management?
10. In which phase is the change-management process typically involved the most?
11. Describe how the performance management process might be done in each of the following functions (or subsystems): strategic planning, human resource management and financial management?
12. What are at least three major considerations when deciding whether a system is operating in a highly effective (highly performing) manner or not?
13. When assessing the performance of a consulting project, what is the best order of the following questions: a) What is “success” in the consulting project? b) What should we do now? c) How should we accomplish that success? d) Are we accomplishing that success? e) Overall, what are we learning?

Perspectives on Change in Organizations

(This course describes the foundational principles and practices needed to successfully change an organization or a major subsystem within the organization. The course does not specify the step-by-step consulting process needed to change the organization. That process is described in CDI’s Series “Collaborative Consulting Training”.)

Foundations of Change

1. What does each of the following phrases mean: organizational change? change management? organizational performance management? organizational development? Organization Development?
2. Briefly describe each of the following types of change: organization-wide versus subsystem, transformational versus incremental, remedial versus developmental, and unplanned versus planned.
3. What are at least three typical barriers to change? What is perhaps the biggest barrier?
4. What are at least three types of major surprises that can happen during change and that can significantly affect the project for change?
5. What are at three of the five phases of a successful project for change and what is their general order in the project? (Hint: If you are already an organizational consultant, then think about Cummings and Worley’s phases.)
6. True or false: The phases are highly integrated, you can cycle back to an earlier phase if needed, and there are different styles of leadership needed for each phase.
7. What are at least three strategies that can be used to motivate change? What are the most important priorities of leadership during this phase?

8. What are at least three criteria for a useful vision for change? What are the most important priorities of leadership during this phase?
9. What are at least three strategies for developing political support for change? What are the most important priorities of leadership during this phase?
10. What are at least three strategies for managing the transition during major change? What are the most important priorities of leadership during this phase?
11. What are at least three strategies for sustaining momentum during major change? What are the most important priorities of leadership during this phase?

Planning Your Change

(This section in the “Perspectives on Change in Organizations” course includes general guidelines for developing any overall plan for managing significant change in an organization. CDI’s course “Consulting Phase 2: Action Planning” goes into much detail about how to develop relevant, realistic and flexible action plans in a specific consulting project.)

1. What are the features of a model for change management?
2. What are at least three different models for change management and what is at least one feature of each model?
3. What are at least three critical roles, or functions, that must be included in any planned change effort?
4. Why is it so important for the consultant and client to work collaboratively when developing plans for change?
5. What is the role of the Board of Directors and how its role critical in any effort to successfully change a major system in an organization?
6. What are at last eight different kinds of capacity building activities (“interventions”) to enhance the performance of a major system in an organization?
7. What are at least three common considerations when selecting what kinds of capacity building activities to include in a capacity building project?
8. What does the following principle for changing systems mean and how does it influence how to plan a project for significant change: “There is no blame”?
9. What does the following principle for changing systems mean and how does it influence how to plan a project for significant change: “Structures determine behaviors, which determine events”?
10. What does the following principle for changing systems mean and how does it influence how to plan a project for significant change: “Problems are in inter-relationships”?

Focusing Your Change

(This section in the “Perspectives on Change in Organizations” course is about where the project, the consultant and client should each generally focus during any successful project for change. It also suggests the components that should be in any Change Management Plan. CDI’s course “Consulting Phase 2: Discovery” goes into much detail about how to accurately “diagnose” the cause of the client’s problem and where to very specifically focus in a specific consulting project.)

1. Regarding where consultants should focus on themselves during change, what is probably the most important area for a consultant to focus on? (Hint: It has to do with staying sane 😊)
2. What should a consultant think about regarding their natural and preferred consulting style and their natural biases when focusing plans for change?

3. Why is it important to have at least one preferred, specific and systematic model for change in mind when focusing the plans for change?
4. How does a listing of personal values and ethics help a consultant to maintain a moral compass during projects for change?
5. What are some sources of continual feedback for a consultant during his or her professional consulting career?
6. Regarding where the consultant and client should continually focus together during change, what are some questions that both could ask to ensure there are sufficient resources for each phase of a consulting project?
7. What are some questions to assess if the client is ready for the current and next phases of the change process?
8. What are some questions to assess the current quality of leadership support in the project?
9. What are some questions to assess the current extent of the client's ownership in the project?
10. What are some questions to assess the current level of trust between the consultant and client during the project?
11. Regarding where the project should focus, why is it so important to ensure continual focus on organizational performance?
12. What does it mean to maintain continued focus on causes and not symptoms during a major change effort?
13. What does the "20/80 Rule" mean and how does it influence where to focus plans for change?
14. What are at least five important components that should be in any plan for significant change in an organization?
15. What are at least three different definitions that the consultant and client might agree on as being the ultimate "success" for a consulting project?

Current Trends in Organizations

1. What is at least one major advantage of the driving force of many new and innovative technologies available to organizations? One major disadvantage?
2. What is at least one major advantage of the driving force of expanding markets around the globe? One major disadvantage?
3. What is at least one major advantage of the driving force of increasing diversity in workplaces? One major disadvantage?
4. What is at least one major advantage of the driving force of increasing competition to organizations? One major disadvantage?
5. What is at least one major advantage of the driving force of increasing number of unmet social needs to organizations? One major disadvantage?
6. What is at least one major advantage of the driving force of increasing public scrutiny on organizations? One major disadvantage?
7. What are at least five traits of the old paradigm of viewing – and operating in – organizations?
8. As a result of the above-mentioned driving forces of change, what are at least five traits of the new paradigm?
9. What are at least four new types of organizational structures?
10. What are at least four major trends in nonprofit organizations?
11. What are at least three major trends in leadership and management?
12. What are at least four major trends in governance?
13. What are at least four major trends in consulting?