



CONSULTANTS
DEVELOPMENT
INSTITUTE

Syllabus for Organizational Consulting in Business

- Program includes seven virtual Modules that participants and faculty schedule ahead of time
- Each module includes:
 1. 1-2 hours of assigned readings from the text and other supplemental materials
 2. 90-minute virtual seminar with faculty and learners to discuss highlights from the readings and to address questions from learners
 3. 90-minute virtual peer coaching with faculty and learners to a) reflect on learners' past applications of program materials, and b) help each learner plan how to apply this module's materials in life and work
- Each learner participates in an ongoing private email exchange with faculty and fellow participants
- Each learner documents ongoing learning and actions in the learner's Learning and Development Journal
- Program meets part of the requirements for "Certification in Organizational Consulting in Business"
- For more information about this program and certifications, see ConsultantsDevelopmentInstitute.org
- Each of the following topics is presented in the context of consulting in a business organization

Module #1 – Intro to Program

Pre-Readings and Reflections

Overview of Program
Overview of Peer Coaching Process

Meeting Activities

Introductions to faculty and learners
Team building among learners (as needed)
Review of program agenda and materials
Overview and practice of peer coaching groups
Description of pre-reading before Module #2
Schedule all future seminars and peer meetings

Module #2 – Start-Up and Contracting

Phase 1: Client's Start-Up

Understand How Client Saw Need for Help
Understand Client's First Efforts to Change
Understand Client's Decision to Get Help
Understand How Client Selected Consultant

Phase 2: Engagement and Agreement

Arrange First Meeting with Client
Understand Client's Current Perceptions of Need
Clarify Desired Project Outcomes and Timing
Decide How Project Should Be Administered
Help Client Understand and Accept Evaluation
Learn Client's Style and Organization
Assess Client's Readiness for Project
Decide If You and Client Should Work Together
Develop Powerful Proposal and Contract

Module #3 – Discovery and Feedback

Phase 3: Discovery and Feedback

Establish Focused and Aligned Project Team
Select Most Appropriate Diagnostic Model
Plan Useful Data Collection Around Client's Issue
Consider What's Unique About Client's Situation
Quickly Collect Relevant and Useful Data
Identify Useful Findings and Recommendations
Share Action-Oriented Feedback with Client
Ensure Client's Commitment and Buy-In

Module #4 – Action Planning

Phase 4: Action Planning

Ensure Collaborative Planning With Client
Develop Grand and Strategic Visions for Change
Develop Relevant and Specific Action Plans
Align, Integrate and Reality-Check Actions
Identify Specific Indicators of Project Success
Develop Plan to Evaluate Process and Results
Develop Plan to Identify and Collect Learnings
Develop Plan to Recognize and Celebrate Success
Develop Plan to Communicate Status and Results
Develop Overall Change Management Plan

Module #5 – Implementation & Change

Phase 5: Implementation and Change

- Integrate Change Throughout Organization
- Focus on Critical Ingredients to Maintain Change
- Coach Client for Motivation and Momentum
- Guide Client to Delegate for Ongoing Momentum
- Use Tools to Track Status of Implementation
- Systematically Adjust Plans If Really Needed

Dealing With Resistance During Change

- What is Resistance?
- Recognize Another Individual's Resistance
- Respond to Another Individual's Resistance
- Manage Your Own Resistance
- Manage Interpersonal Conflicts

Although all learners should read all topics, different learners might choose to be coached on different topics in their peer coaching groups. Learners might choose topics that are currently very interesting to them or that they are applying in their consulting activities – *this is the essence of just-in-time learning.*

Module #6 – Adoption and Termination

Phase 6: Client's Adoption and Evaluation

- Overcome Common Barriers to Implementation
- Assess If Client Has Adopted New Systems
- Evaluate If Project Achieved Desired Results

Phase 7: Project Termination

- Understand Reasons Projects Are Terminated
- Avoid Dependency and "Project Creep"
- Identify Next Steps for You and Client
- Formalize Termination of Project

Module #7 – Closing and Celebration

Prepare for Closing and Celebration

- Reflect on program content and learning

Meeting Activities

- Reflection from each learner
- Sharing feedback about overall program
- Acknowledgement and celebrating each member
- Presentation of program certification