CDI Capstone: Guidelines to Learn About Yourself as a Consultant

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Directions

This Capstone project is part of CDI’s Series “Collaborative Consulting Training”. As you go through the guidelines in this document, complete the companion document “Worksheet to Summarize Your Learning About Yourself as a Professional Consultant” at http://tinyurl.com/ju7uuvo. If you are completing the Worksheet as part of the requirements for a Certificate in the Series, then email the completed Worksheet to info@ConsultantsDevelopmentInstitute.org, including your name, the name of the Series, and your status in the Series, so far. It takes approximately 2 to 2.5 hours to complete the worksheet. (You can learn more about the overall Series at http://tinyurl.com/jban4tb.)

You are an Instrument of Change – Every Part of You

Know Yourself to Know Your Clients

Consultants cannot work completely separate from their client’s organizations. The moment that a consultant begins to communicate with members of the client’s organization, that consultant begins to make a difference in the organization – that consultant is an “instrument of change.” You cannot be a successful change consultant if you do not understand yourself as the “tool” and how that tool is used. Guidelines in this section will help you to understand how you can be a successful instrument for change in your client’s organization. The guidelines are useful in all phases of the consulting cycle. The guidelines are applicable whether you are an external or internal consultant.

We often perceive what we believe and our perception is reality. Our beliefs are based on our perceptions and assumptions about ourselves and the world around us. The accuracy with which you understand your clients, their problems and their organizations, depends a great deal on how well you understand yourself. You must recognize your own biases about organizations, including how organizations should be led and managed. You need to recognize the “lens” through which you filter your perceptions about organizations. You also need to recognize how you prefer to collect and organize information, along with how you solve problems and make decisions about that information. Those features of yourself comprise your “mental model,” or your mental framework that drives your perceptions, assumptions, beliefs and, ultimately, what actions you take in the world.

Success Comes from Your Expertise – and from Who You Are

There are other advantages to having a clear understanding of yourself during consulting projects. The quality of the working relationship between you and your client often determines the quality of the project itself. Successful organizational change projects require the strong, ongoing ownership, commitment and participation of your clients. To get that from your clients, you must engage in a highly collaborative relationship with your clients. However, first your clients need to feel respected and trusted by you. They need to believe that your values and style are compatible with theirs. You can influence your client’s impressions by understanding how you “come across” to people in different situations. That kind of self-awareness is a great asset for you, particularly when working to understand and adapt to different cultures.

The guidelines throughout this overall section will help you to maintain a strong awareness of yourself and how clients might perceive you during your projects.

How Do You Define “Consulting” to Yourself and Your Clients?

Peter Block, in his seminal book, Flawless Consulting, explains that a “consultant” is someone who is trying to change another person, process or organization, but who has no direct control over what they are trying to change. Usually, that change is intended to improve performance – the effective and efficient achievement of goals. One of the greatest frustrations of consulting is the desire to change your client’s organization, but not having direct influence to accomplish that change. Experienced consultants have learned to work with – and even appreciate – the indirect nature of effective consulting.
You might argue that a leader acting as an internal change agent is not an internal consultant because he or she does have at least some direct control over employees. However, there is not nearly the extent of direct control that you might assume – especially during long, but successful journeys for change. The highly collaborative and facilitative internal consultant or leader does not always exercise direct control and often is quite successful in guiding change. Thus, a successful leader during change is acting much more like Block’s definition of consultant than you might realize.

**What Type of Consultant Are You?**

**Technical consultants**
They usually provide highly specialized content expertise regarding certain specific systems and processes in the organization, for example, computer systems, financial and accounting systems, market research or facilities management. Many organizations hire technical consultants. The types of services provided by these consultants are often referred to as technical assistance.

**Management consultants**
They help leaders and managers be more productive at planning, organizing, leading and coordinating resources in the organization. Applications for their services might include leadership, management and supervisory development. The types of services provided by these consultants might be referred to as either technical assistance or organizational development activities (see the next paragraph).

**Organizational development consultants**
This type of consultant helps organizations improve performance, often by focusing on changing a significant portion of the organization or the entire organization itself. These consultants often use a wide variety of approaches, tools and techniques to affect various systems and functions across the organization, for example, technical assistance, coaching, facilitation and training.

There has been some confusion about the focus of organizational development consultants. Some people assert that these consultants focus mostly on “soft” skills regarding peoples’ beliefs, feelings and perceptions, and less on “hard” skills regarding organizational structures, processes and operations. Other people assert that organizational development consultants focus on both the “soft” and “hard” skills. (This author follows the latter assertion.)

Many people believe there is a difference between the phrases “organizational development consultants” and “Organization Development consultants.” These people might use the latter phrase to refer to consultants who adhere to certain working assumptions and values commonly associated with the field of Organization Development.

**Generalists and Specialists**
Some people refer to specialists and generalists as overall, major types of consultants. They might refer to technical consultants as specialists. Many people would consider organizational development consultants to be generalists.

Whether management consultants are generalists or specialists depends on the nature of their services. The more specific the nature of their services, the more likely they would be referred to as specialists.

**Functional or Focused Services**
Recently, the terms “functional” and “focused” have been used to refer to servicing a specific system, function or process, for example, marketing systems, financial systems or information technology. Functional and focused activities are considered similar or the same as technical assistance.
Types of Consulting Can Overlap

The distinctions among the types of consultants can be blurry. For example, a management consultant or technical consultant might operate as an organizational development consultant if they work in a manner that affects a significant portion or all of the organization.

Also, each type of consultant might be needed at various times in a project. For example, if you are an organizational development consultant, you might work with a client to identify the most important problems in an organization. Later on, you might function as a management consultant to train and coach various leaders and managers during the change effort. You might also bring in various technical consultants to contribute their specific expertise to the change effort.

What Are Your Primary Roles as a Consultant?

Advisor

An advisor helps clients primarily by sharing expert advice to fix a problem. This role is particularly useful when the client’s problem is best solved with a standard sequence of specific events, for example, when implementing or fixing a technical system.

Trainer

A trainer helps clients primarily by guiding and supporting them to achieve new learning (new knowledge, skills and abilities). This role is especially useful when the client needs the learning – or new competencies – in order to achieve specific and usually recurring goals. The trainer might use a wide variety of methods, ranging from one-time lectures to an ongoing and highly integrated set of pre-assessments, trainings, exercises and post-assessments.

Facilitator

A facilitator guides and supports a group of people to develop and implement the best group process to achieve the group’s desired goals. The facilitator might use a wide range of methods, including meeting management, customized methods of group decision-making and problem-solving, and numerous and different group interventions. The group process is different from the group content, which is the result of the group’s decisions that they make in order to achieve their goals.

Coach

A coach supports an individual or group to clarify their desired goals, take relevant and realistic options to achieve their goals, and to how to learn at the same time. A coach might use a variety of methods, including pre-assessments, values clarification, goals and action planning, and especially reflective questions to bring out the wisdom and commitment of the individuals involved.

Combination of Roles

Different types of consultants might fill different roles throughout a project. For example, you might work in a highly facilitative fashion to help clients identify the most important problems in their organization. Later on, you might function as an expert when training various members of the organization about approaches to organizational change and performance management.
What Are Your Professional Goals as a Consultant in Any Project?

Block suggests that the following goals be primary for people working to help others to accomplish change, particularly change to a significant portion of an organization or to the entire organization itself. The following overall goals apply to any type of consultant.

1. **Establish a collaborative relationship with your clients.**
   As a consultant, you should work with your clients as if you are peers working as a team. This is in contrast to the consultant who works as an “expert” and directs the client about exactly what to do and when. Working in a collaborative fashion with your clients helps you ensure that recommendations are accurate, clients follow the recommendations and that they adopt the changes needed.

2. **Solve problems so your clients can solve them later themselves.**
   The approach to problem solving in the project should always involve your client’s learning about what is being done and why, so your client can repeat the approaches to problem solving long after you are gone.

3. **Ensure attention to developing the project and, at the same time, to relationships.**
   The quality of the relationship between you and your client is a reliable predictor of the quality of the outcome of the overall project. Your clients often judge a project, not so much by the outcomes from the project, but by the quality of the working relationship with you.

What Are Your Working Assumptions as a Consultant in Any Project?

Block also suggests the following working assumptions for any type of consultant. The assumptions form the basis for why collaborative consulting is so powerful.

1. **Problem solving requires information that is as accurate as possible.**
   Information is more accurate if it reflects the full range of perspectives and opinions among clients in a project, so involve them as much as possible.

2. **Effective decision-making requires free and open choice among participants.**
   Free and open choice is more likely to produce the full range of opinions necessary for good planning. It also is more likely to ensure that your clients adopt the changes necessary to bring about change.

3. **Effective implementation requires the internal commitment of your clients.**
   If you give participants little choice about what to do, they will likely do what you direct, but only for as long as you are around – and they will not be vested in the outcomes. They may also blame you if it does not work. In contrast, if you involve them as much as possible in project planning and implementation, they are much more likely to implement the plans completely and learn at the same time.

What Are Your Biases (We All Have Them)?

Your biases play a major role in how you perceive your client. Your perceptions are your reality, whether they are the reality for someone else or not. Differences in perception between you and your client can make the difference between a successful project and a complete disaster. So know your own biases. For example:

- Do you believe that leaders should “take charge” and lead from the front of the organization? If so, you might encounter frustration and resistance when working with clients who believe that leaders should lead from the middle.
- Do you believe that, if an organization struggles for a year or so, it should just be shut down? If so, you might find it difficult to accept a small organization working hard to sell a certain product, but just cannot get enough resources.

- Do you believe that clients should just “shut up and listen to you?” If so, you will probably find that clients will either seem glad that you are there (but then they will not do what you say) or they will kick you out of their offices.

- Do you believe that all businesses should maximize profits as soon as possible? If so, you will be frustrated when they place priorities on mission and passion, rather than on the “bottom line.”

- Do you believe that meetings should start and end on time? If so, you will certainly be frustrated with people from cultures that place far less emphasis on time.

- Do you believe that most problems would be solved if people just did what they were supposed to do? If so, you probably should not be a consultant.

Do You See “Problems” or “Opportunities”?

This might seem like a trivial consideration. However, it can make a huge difference in how you and your clients perceive and participate in projects. Perhaps no philosophy or movement has made this point better than that of Appreciative Inquiry (AI). AI makes the point that, very often, we create problems and issues by considering and calling them as such.

Practitioners of AI might focus project activities especially on the organization’s opportunities and strengths (rather than on its threats and weaknesses). For example, they might help clients to clarify a positive vision for the future and then use those opportunities and strengths to reach that vision.

The overall philosophy and associated attitudes that you choose to use in your consulting activities is up to you. Realize that that choice might also influence the quality of the relationships between you and your clients, depending on the philosophies and attitudes of your client.

What Are Your Natural Responses to Feedback and Conflict?

How Do You Respond to Feedback?

One of the best ways to influence your client during a project is to model the behavior that you want from your client. Usually, you want your client to be open to receiving feedback, whether the feedback is about their organization and its problems or even about the role that your client plays in the problems. Thus, to model that kind of behavior, you want to be open to feedback yourself. Often, that is easier said than done.

In this context, feedback is information about your actions or performance and is information that you act on. This is in contrast to information about others or either too vague or indirect to be useful to you.

Feedback from clients might make you feel uncomfortable. However, you can manage your actions in response to their feedback. Even if you feel threatened, frustrated or angry about the feedback, you can remind yourself that the feedback is not necessarily directed at you personally. Often, the feedback has more to do with your client’s fear about the project than about you as a person.

You can also remind yourself that feedback from clients is a valuable gift to you. For example, it is not uncommon that consultants get so highly involved in their client’s organizations and problems that they lose the professional objectivity required to be effective as consultants. Feedback from clients can be valuable forms of learning for consultants in these situations. Based on their learning, they realize they are too close to the problems in their client’s organization and so they regain their perspective and effectiveness with their clients.
How Do You Respond to Conflict?

Experienced consultants realize that conflict is a natural outcome from interactions among different people and from changes in an organization. Conflict can have a variety of causes, for example, differences in perceptions among people, feelings of fear or disrespect, power conflicts, poor communication techniques or just plain fatigue during organizational change.

Conflict is not inherently bad. Problems come from how the conflict is addressed. Effective conflict management includes focusing on the issue at the heart of the conflict, rather than on the personalities of the people involved. It includes using effective means of communication, such as effective listening, supportive questioning and noticing non-verbal (non-spoken) communications.

You want your clients to advantageously recognize and manage their conflicts, rather than denying that those conflicts exist or engaging in ongoing destructive arguments with others. You can model successful conflict management by effectively responding to conflict within yourself.

It is not uncommon for clients and consultants to have strong emotions about change at various times during a project. It will be important for you to carefully respond to those emotions from your clients, recognizing the emotions and allowing your clients the freedom to express them. How you respond to conflict yourself is often how you to respond to the strong emotions of others.

What Is Your Emotional Intelligence?

There are different definitions for emotional intelligence (EI), but it is probably fair to generalize that it is the ability to recognize emotions – ours and our client’s – and then manage our responses to those emotions in a manner that enhances our health and our relationships with others. Here are some basic guidelines that might be useful in enhancing your own EI.

1. Notice how you are feeling and be able to name the emotion, for example, mad, glad, sad or bad. Be careful not to get confused between your thoughts and feelings. Notice the difference between and then use “I feel …” and “I think …” statements.

2. Notice how you judge those emotions, for example, you might believe that “it is scary and bad to feel angry.”


4. Notice the difference between your emotions and your outward responses to those emotions – what others would see you do and say. Ask yourself how you choose to feel about something and whether your behavior is aligned with that choice.

5. Realize that it is OK to have strong emotional reactions. It is what you do with those emotions that can be a problem for you and others.

6. Notice how long you retain those emotions. What changes them?

7. Notice what makes you happy and plan for those situations on a regular basis.

8. Notice how you make conclusions about other peoples’ feelings. What are they doing or saying?
What Are Your Natural Approaches to Gathering and Processing Information?

Gathering and processing information is at the heart of solving problems with your clients. Different people have quite different preferences and approaches for doing that. If your approaches are different than your client’s, that can cause confusion and frustration – and ultimately to conflicts with your clients. So it is very important to understand your own approaches. You might discuss the approaches with your clients, too.

Intuitive Versus Sensing Approaches to Gathering Information

There are a variety of assessment instruments that are often referenced when helping people understand their own unique styles when solving problems and making decisions, for example, the Myers-Briggs Type Indicator instrument. One of the dimensions of the Myers-Briggs is “Intuitive versus Sensing,” which considers how a person gathers information. (Myers-Briggs is a registered trademark of Consulting Psychologists Press, Inc.)

Intuitive

A highly intuitive person often gathers information instinctively. They thrive on ideas and possibilities. They might seem oblivious to what is going on around them, yet they often effectively solve problems and make decisions based on surprisingly valid information. Many times, they might not know how they did it. Some experts on leadership and management assert that highly experienced people often have developed intuition that enables them to make quick, effective decisions. A major advantage of this approach is that it can save a great deal of time. A major challenge can be in explaining their choices to others.

Sensing

These people thrive on facts and information. They are very detail-oriented and accuracy is very important to them. solve problems and make decisions by considering the “data” around them. One of the major advantages of a sensing person is that their actions are often based on valid information. Thus, they are able to explain their reasoning and their actions to others. A major challenge is the time and care required to solve problems and make decisions.

Thinking Versus Feeling Approaches to Processing Information

Another major dimension of the Myers-Briggs Indicator instrument is “Thinking versus Feelings,” which considers how a person makes decisions about information.

Thinking

A thinking person often uses a highly objective, sometimes rational approach to organizing, analyzing and making decisions about information. At their extreme, they might shun consideration of emotions. The thinking person probably prefers the rational approach to problem solving as described above in this subsection. The advantage of this approach is that it often generates valid problem solving and decision-making. A major challenge can be that it might require an extensive amount of time to come to action.

Feeling

The feeling approach is used most often by individuals who are quite sensitive to their values in processing information. When people focus on their values, emotions often come into play. A major advantage of this approach is that it can help to ensure that people are happy and fulfilled in the situation – that their values have been considered during the process and are reflected in the outcome. A major challenge is that there are a variety of short-term factors that can influence a person’s emotions other than the current major problem or decision, for example, their not having had enough sleep or having eaten right.
What Are Your Natural Approaches to Problem-Solving and Decision-Making?

Different people have quite different preferences and approaches for solving problems and making decisions. Those differences can often cause conflict between people unless they each understand their own particular preferences.

The following preferences represent probably the most common preferences. It is important for you to note that any preference is not necessarily better than others. Certain preferences might work better in certain situations. The important point for you to realize is the diverse ways that people – including you – address problems and decisions. Always consider that diversity in your consulting projects.

Rational

A person with this preference often prefers using a comprehensive and logical approach similar to the following procedure. For example, the rational approach, described below, is often used when addressing large, complex matters in strategic planning.

1. Define the problem.
2. Examine all potential causes for the problem.
3. Identify all alternatives to resolve the problem.
4. Carefully select an alternative.
5. Develop an orderly implementation plan to implement that best alternative.
6. Carefully monitor implementation of the plan.
7. Verify if the problem has been resolved or not.

A major advantage of this approach is that it gives a strong sense of order in an otherwise chaotic situation and provides a common frame of reference from which people can communicate in the situation. A major disadvantage of this approach is that it can take a long time to finish. Some people might argue, too, that the world is much too chaotic for the rational approach to be useful.

Organic

Many believe that it can be quite illusory to believe that an organizational consultant is there to identify and solve problems for the client. Some people assert that the dynamics of organizations and people are not nearly so mechanistic as to be improved by solving one problem after another. Often, the quality of an organization or life comes from how one handles being “on the road” itself, rather than the “arriving at the destination.” The quality comes from the ongoing process of trying, rather than from having fixed a lot of problems. For many people it is an approach to organizational consulting. The following quote is often used when explaining the organic (or holistic) approach to problem solving.

“All the greatest and most important problems in life are fundamentally insoluble ... They can never be solved, but only outgrown. This “outgrowing” proves on further investigation to require a new level of consciousness. Some higher or wider interest appeared on the horizon and through this broadening of outlook, the insoluble lost its urgency. It was not solved logically in its own terms, but faded when confronted with a new and stronger life urge.”

From Jung, Carl, Psychological Types (Pantheon Books, 1923)
A major advantage of the organic approach is that it is highly adaptable to understanding and explaining the chaotic changes that occur in projects and everyday life. It also suits the nature of people who shun linear and mechanistic approaches to projects. The major disadvantage is that the approach often provides no clear frame of reference around which people can communicate, feel comfortable and measure progress toward solutions to problems.

**What is Your Preferred “Lens” Through Which You View Organizations?**

One of the most frequent reasons that organizational consultants argue about the best methods for organizational change is because consultants often have different perspectives, or lens, through which they view organizations. The impact of these differences is often underestimated. For example, you can have two different consultants interact with an organization and they might later provide different descriptions of the same organization. Therefore, it is critical that consultants understand their own perspective and be sensitive to the organizational perspectives of others.

One of the most useful resources to explain these perspectives is *Reframing Organizations* (Bolman and Deal, Jossey-Bass, 1991). The authors depict four quite different and major organizational perspectives among researchers, writers, educators, consultants and members of organizations.

<table>
<thead>
<tr>
<th>Lens</th>
<th>Examples of What is Noticed or Talked About from That Lens</th>
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</thead>
<tbody>
<tr>
<td>Structural</td>
<td>Goals, objectives, roles, responsibilities, performance, policies and procedures, efficiency, hierarchy and coordination and control</td>
</tr>
<tr>
<td>Human Resource</td>
<td>Participation, feelings, fulfillment, communication, needs of people, relationships, motivation, enrichment and commitment</td>
</tr>
<tr>
<td>Political</td>
<td>Power, conflict, competition, authority, experts, coalitions, allocation of resources, bargaining and decision making</td>
</tr>
<tr>
<td>Symbolic</td>
<td>Rituals, culture, values, stories, different perspectives, language, expressions, myths, commitment and metaphors</td>
</tr>
</tbody>
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Note that these are horizontal lens regarding what different people notice across the activities in organizations. There are also many vertical lens through which we view intra-personal dynamics, for example, the many perspectives put forth in the increasing amount of books on personal development.

It is important for you to realize that no lens, or perspective, is better than the others. Experienced consultants have learned that the more perspectives that they can get from their clients about an issue in their organization, often the more accurate and useful are the plans to address that issue. Thus, the more lens through which you can view organizations, the more useful you will be to yourself and your clients.

**What is Your Preferred Focus on Organizations?**

People naturally focus on different areas of the same organization during the same project. That difference can cause conflict and confusion, especially during the initial phases of the project. Therefore, it is important for you to recognize your own preferred scope during projects and, if possible, recognize the scope preferred by your clients. The following are probably some of the most common areas of focus viewed by people during projects.
Focus on “20/80” (Pragmatic Approach)
This perspective tends to generate activities focused on quick, up-front, practical action plans that take 20% of your client’s time and energy, but might address 80% of the problems in your client’s organization. The disadvantage of the 20/80 approach is that ongoing, renewed action plans are sometimes necessary to generate long-term results.

Focus on Functions (Silo Approach)
This perspective focuses primarily on the scope of the “presenting” priority – the priority that is first noticed and reported to you by your client. It might be a major problem in the organization that your client wants to solve, or it could be an exciting goal that your client wants you to help them to achieve. Note that the presenting priority often is a symptom of deeper, more entrenched problems. For example, many leaders complain about lack of money, yet their real problem is ineffective strategic and business planning. A major advantage of this silo approach can be that it often gives quick comfort to your client who wants a “quick fix” and strongly believes where the problem lies in the organization. A major disadvantage is that, because organizations are complex and often rapidly changing, problems often require a larger focus than the particular function first reported as having the problem.

Focus on Holistic, Systems Approach
This perspective places strong focus on the overall system (for example, on the entire organization, product or service) and especially on the relationships among subsystems within the system (for example, on the coordination among processes, such as strategic planning, marketing and sales). This is an example of whole systems thinking. A major advantage of this approach is that it is more likely to effectively address complex challenges in organizations. A major challenge is in mastering systems thinking and use of systems tools.

What Are Your Principles for Ethical Consulting?
Simply put, ethics involves learning what is right or wrong, and then doing the right thing – however, in organizational consulting, the right thing is not always easy to identify. Ethics includes the fundamental ground rules by which we live our lives. Values that guide how we ought to behave are considered moral values, for example, values such as respect, honesty, fairness and responsibility. Statements around how these values are applied are sometimes called moral or ethical principles.

Ethical consultants must have a set of principles, which defines ethical behavior and guides the consultants’ actions toward those behaviors. This is true whether you are an external consultant or an internal leader wanting to lead employees fairly and equally. Many times, those principles are documented as a code of ethics. Also, consultants must be able to recognize ethical dilemmas and have at least one tool to use to address the dilemma. Information in this subsection will help you to develop your principles for ethical consulting, recognize ethical dilemmas and resolve those dilemmas, as well.

It is critical that you establish some major principles, or guideposts, to ensure that you consult in a manner that is fair and equitable and also that minimizes your liabilities as a consultant. Those principles are your “inner compass” in the midst of the confusion and complexity that are typical at various times in an organizational change effort. Here are some important ethical guidelines for consulting during organizational change.

1. Do no harm to your client.
2. Keep client information private unless the client or law requests otherwise.
3. Do not create dependence by you on your client, nor by your client on you.
4. Anticipate and avoid conflicts of interest (for example, representing two opposing interests at once).
5. Do not act in the official capacity as an advocate for your client.
6. Do not go beyond your own expertise.
7. Do not skip the discovery phase of consulting.
8. Treat others the way you want them to treat you.

What Are Your Professional Mission and Values?

Your professional mission and values serve as your “compass” in life and work. This is true whether you are an external or internal consultant. They guide how you make decisions and solve problems, especially during complex and challenging activities. For many of us, our mission and values are implicit – we have not taken the time to clarify them explicitly or to write them down. Without explicitly proclaiming the mission and values from which we want to operate as professional consultants, we are prone to getting ourselves into situations – and operating in those situations – in a manner that does not match our nature and needs. Your professional mission and values can be communicated to clients to help them to understand and trust you, which is critical in collaborative consulting. Therefore, it is important for professional consultants to consider articulating their own mission and value, ideally in mission statements and values statements.

Developing Your Professional Mission Statement

Your professional mission statement describes at least the overall purpose of your consulting activities. There are various perspectives on mission statements. Some people believe the statements should describe an overall purpose. Some people believe the mission should also include a description of a vision, or future state. Some people believe the mission should also include a description of overall values. Mission statements can be just a few sentences long.

There are also various perspectives on how to develop a mission statement. The suggestions below are associated with one of the ways to develop your own professional mission statement to describe the purpose of your consulting activities.

The process of producing your own professional mission statement is as important as the mission statement itself. Therefore, it is important for you to carefully think about your own mission before you reference any mission statements produced by others.

When you write your professional mission statement, it should:

1. Succinctly describe the purpose of your consulting activities.
2. Succinctly describe the overall type(s) of clients you serve in your work.
3. Mention the particular results (new knowledge, skills and/or conditions) that you work to help your clients achieve.
4. Convey a strong public image.
5. Mention any particular strengths and expertise that you have.
6. Be clearly understandable by you and your clients.

Developing Your Professional Values Statement

Your professional values statement describes the most important priorities in the nature of how you want to operate as a consultant. Some people might prefer to do a principles statement. Principles are descriptions of values in action and often begin with the phrase, “I will ...” or “I believe …” Similar to the mission statement, the process of producing the values statement is as important as the values statement itself. The following guidelines will be helpful to you as you develop your own professional values statement.
1. **When identifying values, think about behaviors produced by those values.**
   Many of us struggle to directly identify desired values. We can get bogged down in words that seem too general, idealized – even romanticized – to be useful. Often, it helps first to identify desired behaviors and then the values that produce those behaviors.

2. **Consider any relevant laws and regulations that pertain to your consulting.**
   Identify behaviors or values that will help you operate in a manner so as to avoid breaking these laws and to follow the necessary regulations.

3. **Consider suggested principles for effective consulting.**
   Consider behaviors and values that are in accordance with the most important principles for consulting for you.

4. **Consider your own lens, biases, style, response to feedback and conflict.**
   You might identify behaviors and values that will help you to counter any potential misperceptions or obstacles that you might develop because of your own particular nature and needs.

5. **Consider any current, major issues in your work.**
   Identify the behaviors needed to resolve these issues. Identify which values would generate those preferred behaviors. There may be values included that some people would not deem as moral or ethical values, for example, team-building and promptness, but for many, these practical values may add more relevance and utility to a values statement.

6. **Consider any ethical values that might be prized by your clients.**
   For example, consider expectations of their customers, suppliers, investors and members of the local community. Before you identify these “public relations” values, be careful that you do not select values that you really cannot adhere to in your work.

7. **From the above steps, select the top five to ten values.**
   You cannot be all things to all people, including to yourself. Even if you do include all the values on your statement, it is still important for you to carefully think about which values are most important to you.

8. **Associate with each value, two example behaviors which reflect each value.**
   Examples of behaviors for each value make the values much more explicit and understood to you and to others.

9. **Update the statement at least once a year.**
   The most important aspect of the statement is developing it, not the statement itself. Continued dialogue and reflection around your values cultivates awareness and sensitivity to act in accordance to your values. Therefore, revisit your statement at least once – preferably two or three times – a year.