

26 October 2004

Consultancy skills framework

introduction

This document presents a profile of the core skills required by all consultants. Individual consultants may need especially deep expertise in particular areas or additional skills not covered here.

The underlying assumption is that consultants have a subject area they consult in and then need in addition a range of consultancy skills to enable them to deploy their expertise. The boundary between subject area and consultancy skills is easy to draw for highly technical fields but harder to draw for such areas as management, HR and training.

The importance of individual skills will also vary from person to person, in line with their particular role and the mix of projects they are working on.

The framework consists of a set of skill areas which are subdivided into a series of behavioural elements. The skill areas are a combination of phases of the consultancy process and processes which occur throughout or at any stage. They are used as headings to provide some structure to the framework and to help ensure completeness.

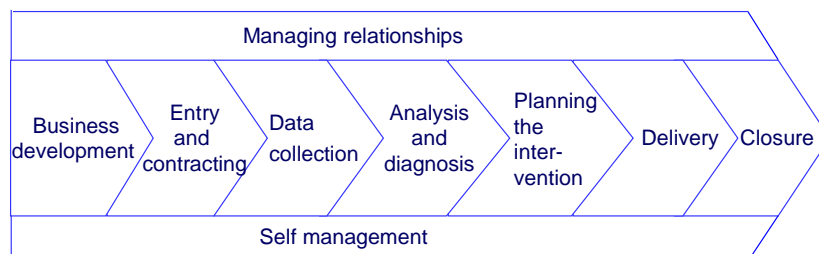
The framework covers both “expert” and “facilitative” styles of consultancy. It is based on the assumption that the approach, even to expert consultancy, should be as facilitative and client-centred as possible - working closely with clients and seeking to gain maximum ownership of the outcomes.

Some behavioural elements are appropriate to more than one skill area, but to avoid repetition each occurs only once, in the section where it is likely to be of greatest importance.

The framework

The framework is shown graphically below and described in detail in the following pages.

Consultancy skills framework



Business development

The precursor – and sometimes the follow-on – to doing consultancy work is to secure business. This clusters concerns general marketing activities. The skills required once a specific possibility has been identified are covered under Entry and Contracting.

- Builds a network of current and potential clients and gatekeepers.
- Is alert for opportunities for new or additional consultancy work.
- Undertakes marketing and promotional activities.

Managing relationships

Getting business, collecting valid data and being able to help all depend to a greater or lesser extent on being able to establish productive working relationships with clients. This group of behaviours is likely to be particularly important in the initial stages of consultancy work, but will remain significant throughout.

- Establishes and maintains rapport.
- Contributes positively to meetings.
- Is aware of impact on others and can modify behaviour if necessary.
- Behaves with integrity.
- Maintains own performance in the face of others' emotion.
- Able to be both challenging and supportive.
- Creates a climate of openness and trust.
- Stimulates and energises others.

Entry and contracting

Entry is the initial exploration of possible work with a new client. It depends heavily on the skills of Managing relationships. Contracting marks the boundary between work which is to be charged to overheads and that which can be charged to clients. It is vital to do it in such a way that the consultant is clear what has to be accomplished and the client has the maximum chance of getting what they really want.

- Assertively presents him/herself as helpful and competent.
- Identifies the real client and other important stakeholders.

- Identifies client requirements, expectations and constraints.
- Assesses the client's motives, agenda and willingness and capability to change.
- Challenges and if necessary refuses unrealistic or unethical client demands.
- Clearly and assertively states own position and proposals.
- Constructs well formed objectives.
- Identifies success criteria for projects which can later be used for evaluation.
- Reaches clear and comprehensive agreements with clients and others.
- Produces a comprehensive work breakdown for proposed projects.
- Estimates task durations and resource requirements accurately.
- Produces realistic and understandable project plans in the form of bar charts.
- Produces persuasive written proposals which accurately reflect the client's requirements.
- Presents verbal proposals confidently and credibly.
- Confirms unambiguously what has been contracted.

Data collection

Consultancy always involves collecting and processing data. This skill area covers deciding what needs to be collected and how. The behavioural elements dealing with particular data collection methods will of course not all be appropriate to each individual project.

- Identifies, with the client, the most important and relevant data to collect.
- Selects, with the client, appropriate method(s) of data collection.
- Judges when sufficient data is available to support conclusions.
- Maintains an open mind, not limited by preconceptions and assumptions – sees things from others' point of view.
- Asks well formed and appropriate questions.
- Listens actively with attention focused on the other person.
- Summarises accurately discussions in interviews and workshops.
- Observes behaviour accurately and makes sensible interpretations.

- Designs and uses suitable methods of collecting data by direct observation.
- Designs usable forms and pro-formas.
- Designs and uses suitable methods of collecting data by analysis of existing records.
- Designs effective workshops and group processes.
- Facilitates effective workshops and group processes.
- Draws statistically reliable samples.
- Carries out surveys and censuses which yield reliable and valid information.
- Designs questionnaires which will yield valid and reliable data.

Analysis and diagnosis

This skill area covers making sense of the information which has been collected. As there is a much wider array of methods than for other parts of the process, they are not identified separately.

- Identifies and uses an appropriate analytical approach and tools.
- Uses appropriate statistical techniques to analyse numerical data.
- Masters complex data and can focus on the essentials.
- Uses content analysis to draw well grounded conclusions from soft data.
- Draws conclusions which are supported by the data.
- Focuses on a selected number of key issues.
- Avoids premature closure and leaping to solutions.
- Diagnoses political and personal factors as well as the presenting problem.

Planning the intervention

This skills area is concerned with identifying possible and appropriate actions in the light of the analysis and diagnosis. The consultant may do the process for or with the client.

- Uses brainstorming and other techniques for creative thinking.
- Generates a range of imaginative options.
- Evaluates options against a range of appropriate criteria.
- Thinks through the practical implications of recommendations.

Delivery

This skills area is concerned with delivering what was contracted for. Some of the behaviours listed below will be required in all projects, others will depend on the role of the consultant and the kind of work being undertaken.

- Chooses appropriate ways of intervening in the client system.
- Maintains objectivity – tells it like it is.
- Identifies and influences key people to gain support.
- Helps the client to challenge existing assumptions.
- Gains commitment to proposals and recommendations.
- Presents information in a clear, well structured and understandable fashion.
- Constructs arguments which use data to support conclusions and recommendations.
- Uses the client's language and concepts.
- Writes clearly and persuasively.
- Makes oral presentations clearly and persuasively.
- Gives feedback which is understandable, acceptable and actionable.
- Confronts unpalatable issues where necessary.

Self management

The behaviours in this skill area apply throughout consultancy work.

- Is aware of the stages in the consultancy process and modifies own behaviour appropriately.
- Is aware of own consultancy style and can modify it when circumstances require.
- Delivers on promises and commitments made to clients and colleagues.
- Sets high personal standards of behaviour and performance.
- Manages own feelings of anxiety, wanting to be needed etc.
- Maintains own performance in the face of stress, disappointment, uncertainty or ambiguity.
- Is confident and positive in the face of new tasks and challenges.
- Learns from experience and mistakes.
- Actively seeks to give and receive direct and constructive feedback.
- Is quick and keen to identify and learn new information, techniques and ideas.
- Contributes effectively as a member of a team.
- Monitors and controls assignments against contracts and seeks renegotiation where necessary.
- Respects the confidentiality of individuals and client organisations.

Closure

Naturally enough, this skill area is primarily employed at the end of an assignment.

- Is able to let go at the end of a project.
- Is alert for opportunities for follow-on work.
- Seeks confirmation from the client that expectations have been met.