

The **ART** and **CRAFT** of Consultancy and Facilitation

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Postgraduate Business Psychology
Conference

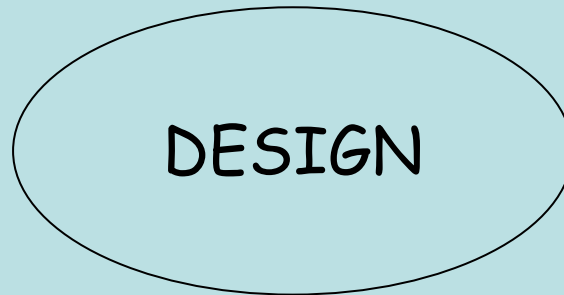
University of Westminster

Who am I?

- A consultant, facilitator, coach and mentor: for last two decades or so anyway.
- An academic (of sorts) “who escaped”, but has had, and has various roles at the University of Mauritius, Reading University, Open University, Cranfield University, City University, and the London School of Economics
- A biologist (of sorts) who observes the behaviour and ecology of people in organisations

What I do: support decision making in the context of change and other interventions

Time



An angle on the problem is adopted

Options are created, or identified, selected, and modelled

Draw up roll-out plans & proceed with delivery or roll-out)

D1: proceed with selected view of problem or go round again

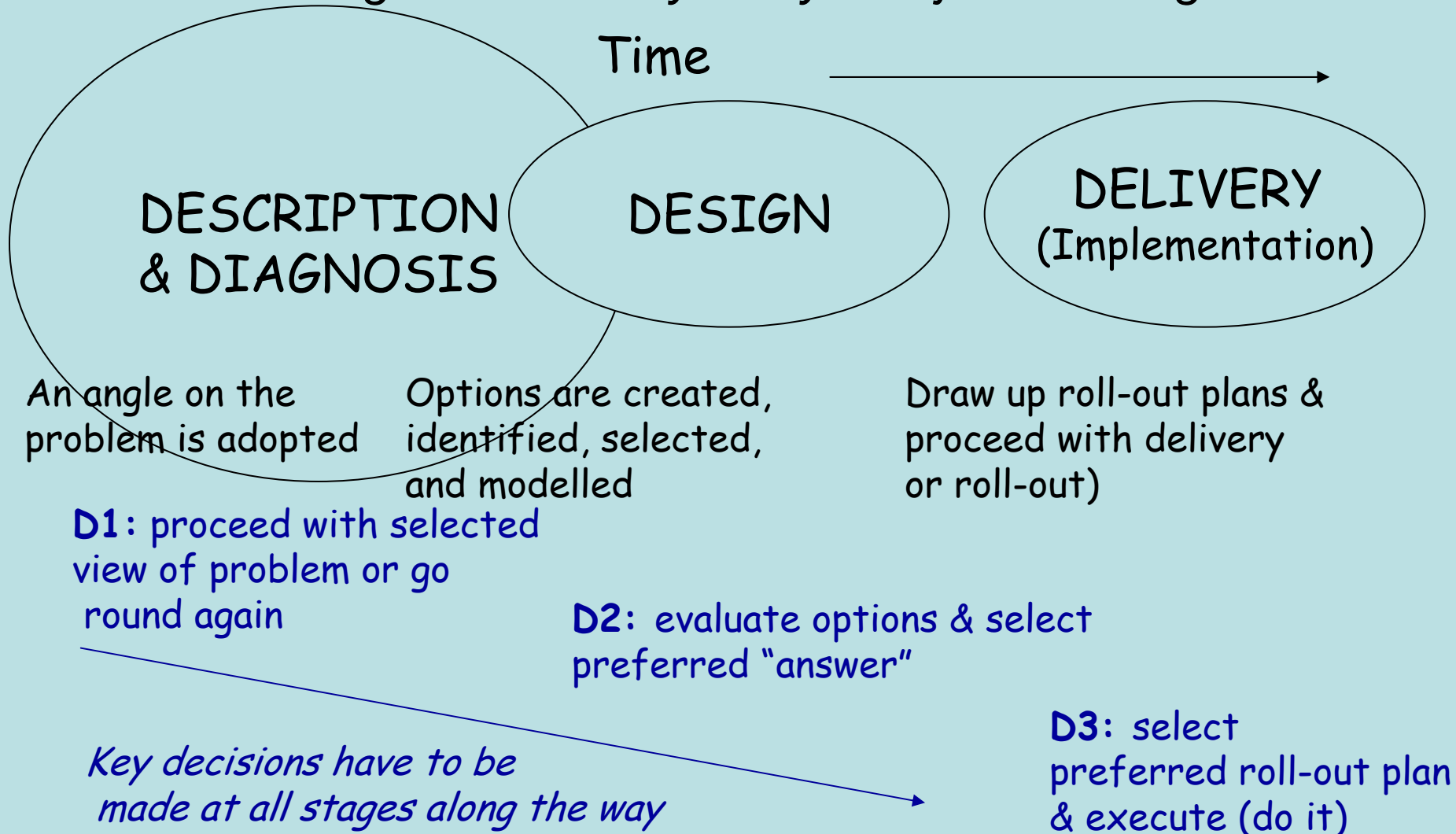
D2: evaluate options & select preferred "answer"

D3: select preferred roll-out plan & execute (do it)

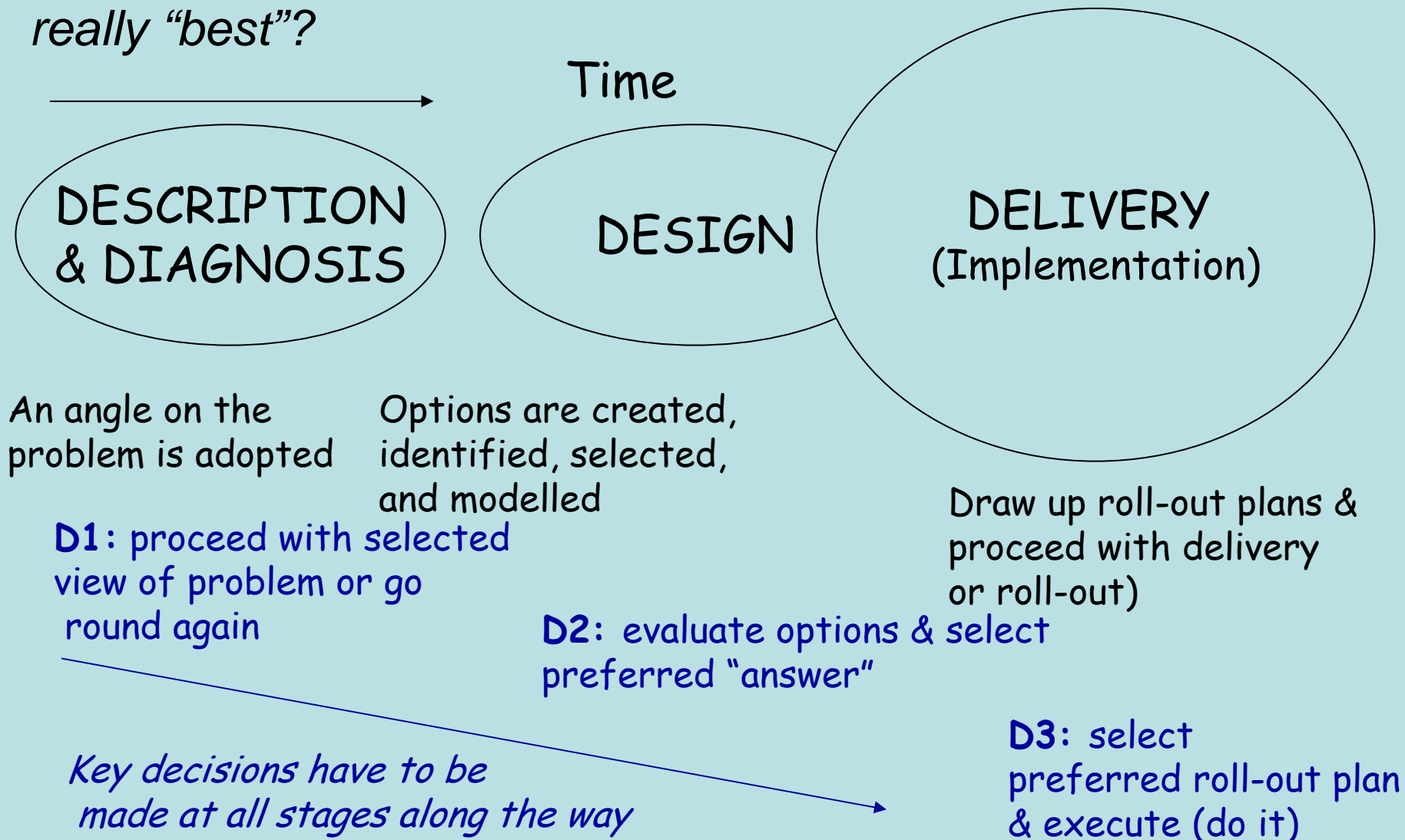
Key decisions have to be made at all stages along the way

Where to start? But is it always this easy?

Sometimes diagnosis is really tricky and justifies huge effort



But is it always that easy? OR delivering the “best” may be expensive difficult and time consuming, so is it really “best”?



Today's workshop

- It's about stuff you won't find in textbooks (well mostly...)
- It's about:
 - you as “self”,
 - you as a person we see and work with,
 - you and the tacit skills you bring to your job
- It's about consultancy: when you are “on the job” it's a lot about your skills as a coach, mentor and facilitator

Assumptions (1): this is all about.....

- **Individuals:** listening, observing, empathising, understanding, supporting
- **Teams and Groups:** building, supporting, empowering
- **Client assignments** that develop into **Programmes and Projects:** building capability and confidence in the client and her/his team

Assumptions (2): this is all about.....

- Working with your client
- Working with your client's team(s)
- Setting up teams for programmes and projects
- Working with your key stakeholders
- Showing your client in a good light with her/his senior colleagues

Assumptions (3): this is all about.....

- Respect for yourself and others
- You and how present yourself
 - Everything matters
 - Dress
 - Dress codes
 - Personal hygiene
 - Your language and tone of voice
 - Your body language
 - Your self confidence
 - Your courtesy
 - Perhaps Gurus can get away with it, but....

There's more to this game than “know-how” and “know-what”

- Age and experience is a help
- You must know your stuff (whatever your field),

BUT THAT'S NOT ENOUGH.....

1. Empathy with your client and his/her challenges
2. Skilled at reading people (body language)
3. Listening skills (especially “active” listening)
4. Several game plans to deal with whatever comes up

ABOUT TODAY

- PART ONE: beginnings and middles
- PART TWO: middles and ends
- OTHER STUFF WE MIGHT GET TO.....

PART ONE: beginnings and middles

- Getting started
- Ice breakers
- Groups and teams and all that

ICE BREAKER

5 to 10 minutes

Just do it

ICE-BREAKERS/WARM-UPS

- Be imaginative and make it fast and fun
 - The mundane who you and what you do (where needed)
 - Which animal are you most like and why?
 - Something from your childhood that tells us who you are
 - Choose a Disney (or Warner Bros) character for yourself, and explain why it fits you
 - Share a secret (private) wish, plan or ambition
- Choose an approach
 - Paired introductions (not one of my favourites)
 - Round robin

Why use ice-breakers?

- With nominal or new groups it does just that
- With folks who know each other: they may still learn something new
- It breaks up the hierarchy and power relationships that may have been brought into the room
- It strengthens the group by giving them “secret” knowledge not known to “outsiders”
- It sets the mood
- **BUT** Choose the theme very carefully: if you get it wrong you can be seen to be patronising the group or trivialising the task.
- Build it from the Johari Window if you wish

The JoHari Window

(Developed by Joseph Luft and Harry Ingham, psychologists working in California in the 1950s)

		SELF	
		Known to you, and known by others	Unknown by you, but known by others
OTHERS	Known to you, but unknown by others	Unknown to you, and to others	

WORKING WITH TEAMS & GROUPS (1)

- When and where:
 - Half days/whole days/two days, more?
 - On-site or off-site
 - Punishment or reward?
 - Plan your programme
- You as facilitator: single handed or two-up?
 - Help mate or equal partner?
 - Observer and analyst?
 - Dependency or engaging the group?

WORKING WITH TEAMS & GROUPS (2)

- Group size: the magic number seven plus or minus two

- WHY?

THE WHY of GROUP SIZE

Just Do it.

Why is 7, plus or minus 2 a good size?

Group A: Brain Storm

Group B: Idea writing and Round Robin
Recording

You decide

10 minutes

PLACES & SPACES: the good, the bad and the ugly

- Board rooms
- Meeting rooms
- Hotel conference rooms
- Group work spaces and project rooms (skunk works)
- Make do with what you get

Some of Bill's pet hates:

- Flock wall paper
- Heavy mahogany tables
- Oil paintings of past chairmen

There's more to spaces than just space

- “Funky spaces” e.g.: Wallace space
<http://www.wallacespace.com/wallacespace.html>
- Going up-market: e.g. The Pelham Hotel:
http://www.firmdale.com/index.php?page_id=15&sub_page_id=57©_page_id=110
- Flexible Learning Environments and “spaces”
<http://www.lse.ac.uk/collections/conferenceAndEventsOffice/hiringConferenceSpaceAtLSE/conferenceFacilities.htm>
- Getting away from it all: e.g. Bishopstrow House Hotel
<http://www.bishopstrow.co.uk/business.asp>
- The Research House (Wimbledon, Wigmore Street, & more)

The 3 “Ps”:

People, Process, Projects

- **People:** they will do the “day job” and keep the business running for you, AND work on the changes. So their input, advice and buy-in are vital.
- **Project:** put your change into a project framework to make it more manageable.
- **Process:** think about the processes and steps by which you will be able to bring about change. Build your own road map into the future.

P Number One: People

- **People and Skills:** have you got the right mix of people and skills for change in place? (buy-in, temp staff to back fill, coaching and training to support and guide staff in their new change roles, flexibility, adaptability)
- **Leadership:** a key part of the mix: maintain focus, open to new thinking, good people skills, good grasp of the big picture.
- **Teams:** a must, big projects may have several interlocking and overlapping teams

P Number Two: Project

- What is **purpose** of the change and what is it designed to achieve?
- **Scale**: just how far reaching is the change?
Local or across the business?
- **Complexity**: level of difficulty, and inherent complexity. Have you through this through?

P Number Three: Process

- Think about the most appropriate **style of intervention**: top-down *versus* bottom-up, and formal, directed *versus* informal and collaborative.
- **DIY or buy in services?** Do you want to go it alone with internal staff only, or seek external support?
- **SEEK a MATCH and BALANCE** in how you present and position your change plans. Will your bosses or peers understand enough of your plans to support them, or will your manner cause them to oppose and sabotage your efforts?

END of PART ONE

Q and A?

PART TWO:

Middles and ends

This is some stuff you may wish to use
along the way

Stuff you can do with groups

- Thinking with pictures
- Group processes
- Group decision-making and prioritisation

Thinking with pictures

- Types of diagram:
 - Mind maps
 - Multiple cause diagrams
 - Fish Bone diagrams (Ishikawa (see also Fishbein on attitudes and predictions of behaviour))
 - Flow charts and swim lanes
 - Graphs
 - Tables
 - Rich pictures
 - Free form “cartooning” etc.

Flip charts, pens and paper

- Whiteboards, the flip chart and blu tack: lessons for the uninitiated
- Post its: good and bad
- Pens: useful and useless
- Lining paper and sugar paper
- Going Hi-tech: copying whiteboards, and PC capture screens (graphics tablets)

Over to you

- What makes a good group?
- What happens in groups when things go wrong?

Use the Multiple Cause Diagram to explore
your ideas

15 mins

What goes on in groups?

- All that stuff about roles (Belbin and De Bono): maybe its useful, but is it over the top?
- What about?
 - A facilitator role
 - A observer role
 - A co-ordinator and recorder role
 - Subject expert

BUT: *In high performing teams these roles can rotate, and individuals can behave in both an extroverted and introverted manner at different times. E.g. when being reflective and when being creative*

What happens in group tasks?

- Iteration, as issues are viewed from different viewpoints
- Re-framing of the decision problem
- The roles played in the group emerge as they engage
- Opportunities for creativity and changes in direction
- Recognition of the subjectivity of decision making, despite pleas for rationality

TA: The Transactional Analysis Model (Eric Berne. 1964. Games people Play)

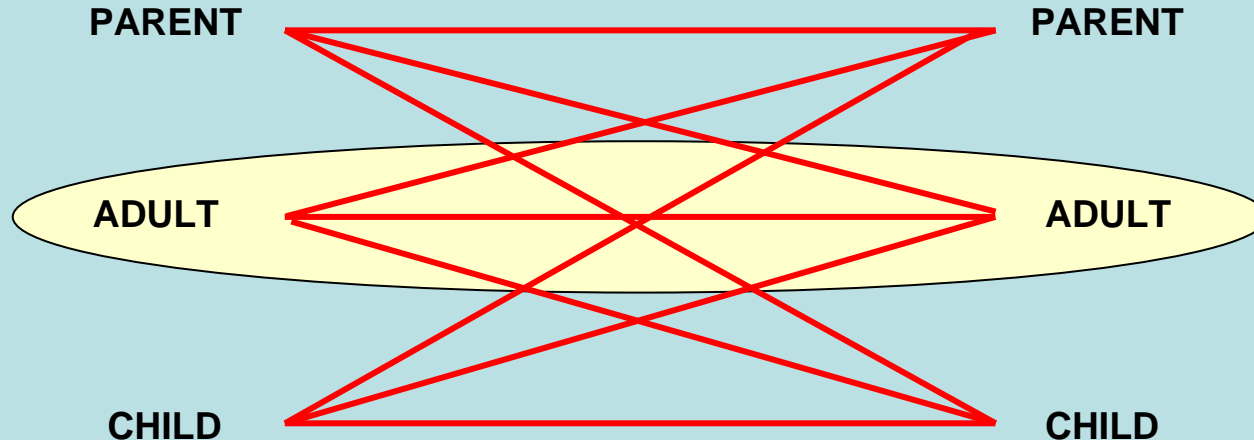
What sort of dialogue are we seeking to achieve?



Person 1

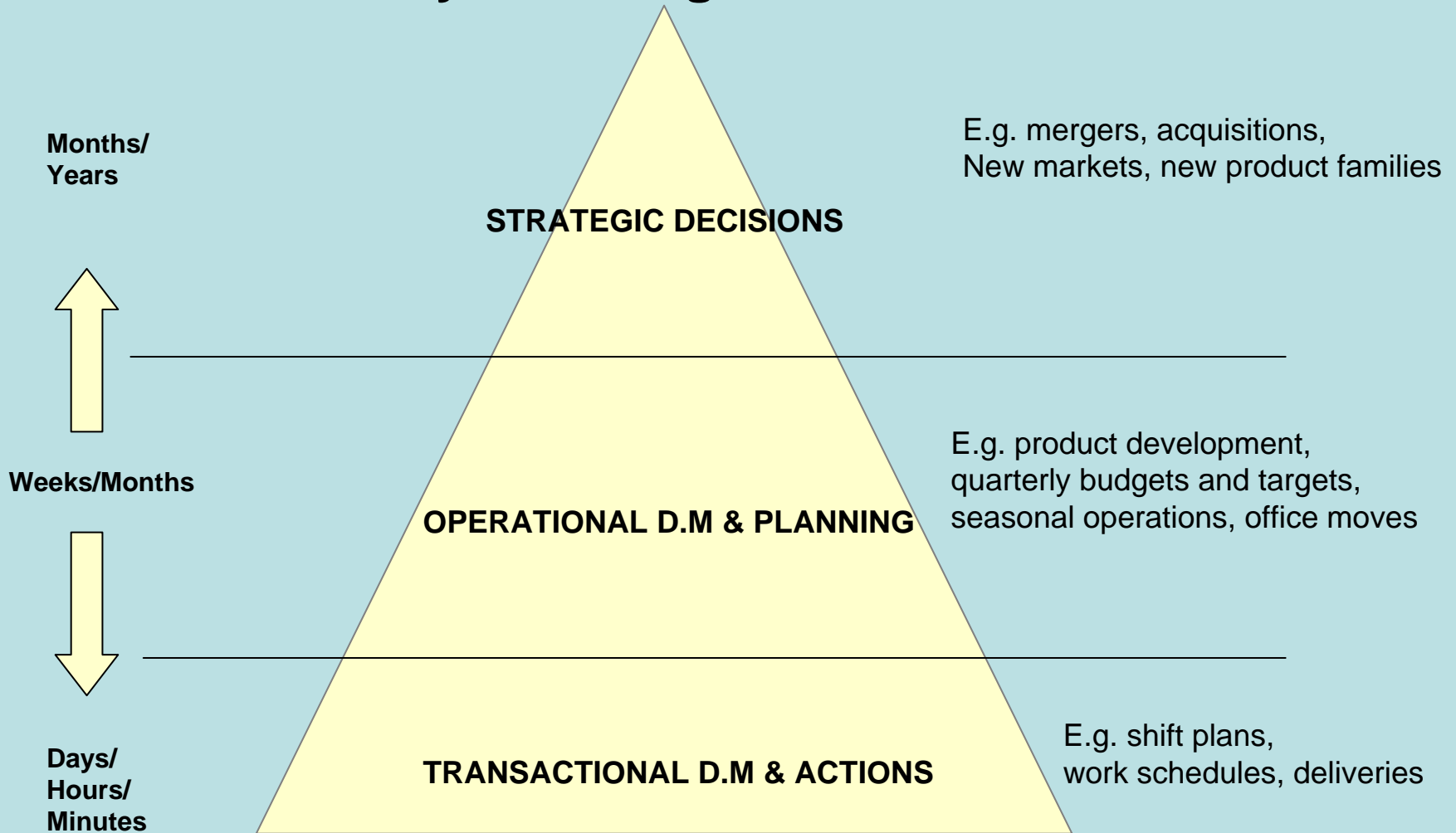


Person 2



TIME FRAMES: Decision Making & Planning in Organisations.

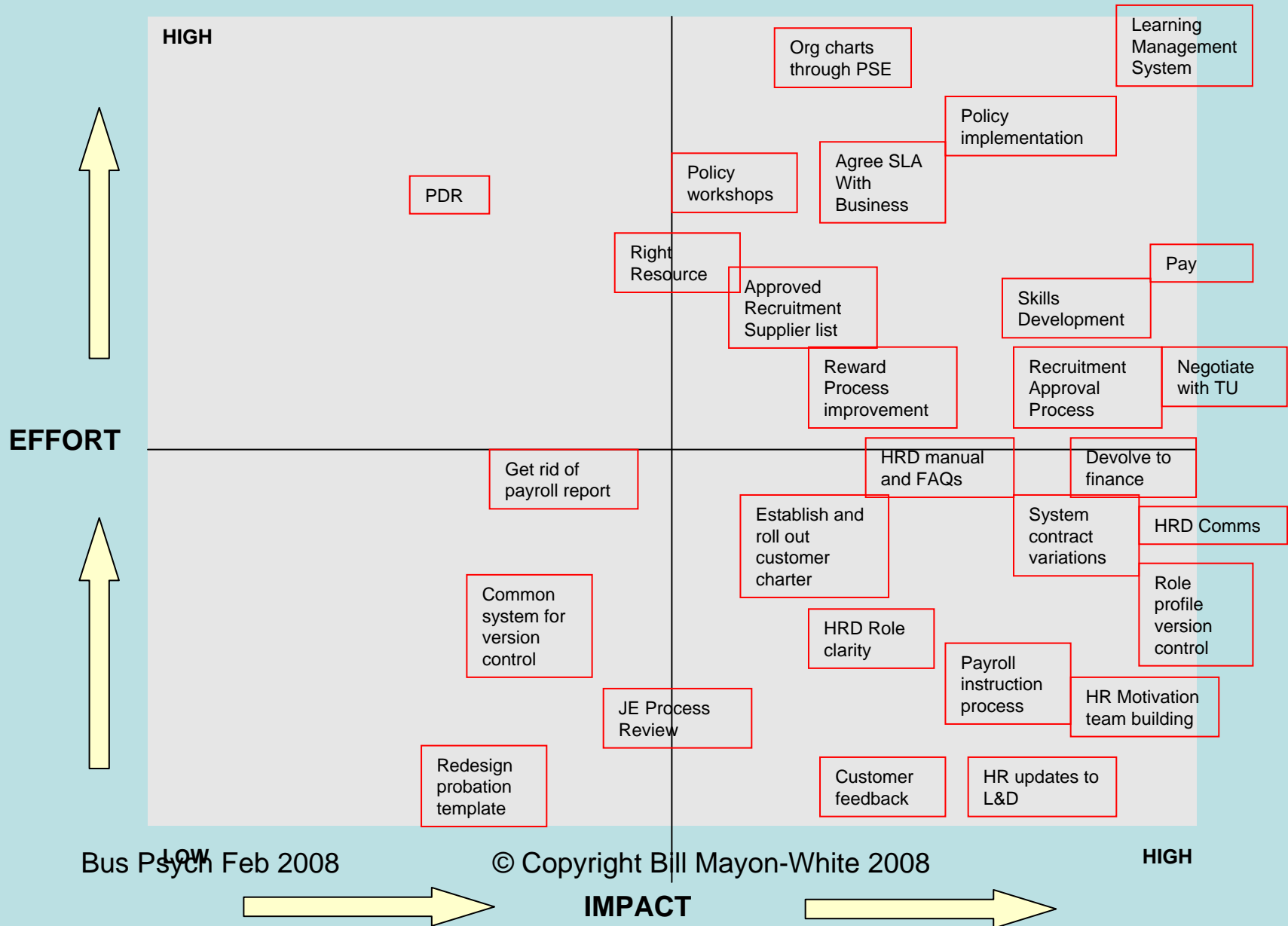
Just what are we/you talking about?



MAKING CHOICES

- Binary decision making: A v B better or worse (the button game, if we have time)
- Multiple criteria and preferences
- Evaluation Matrices and Rex Brown's GOO tables
- Impact and effort assessment grids

Sorting and making choices: impact v effort mapping



If there's time...some exercises

Handling lists of decisions that need to be made and things that have to be done (your next to do list?).

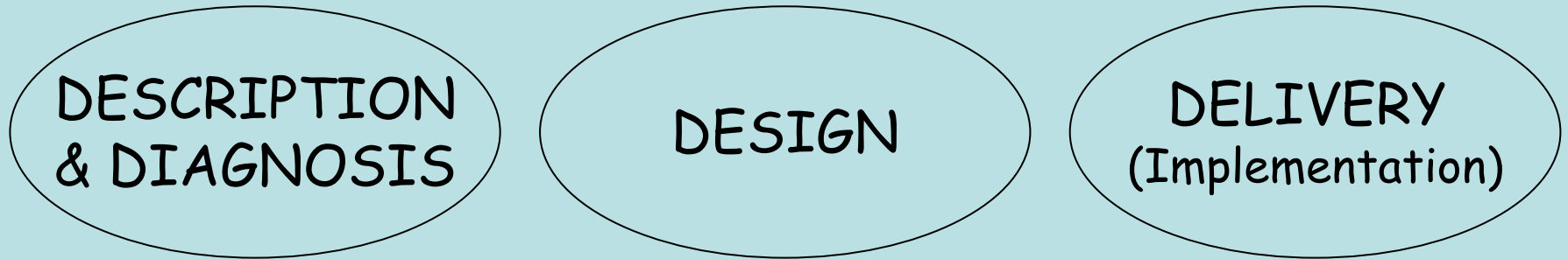
- The buttons game
- Pair-wise comparison
- Evaluation matrix or “GOO” table
- Pens and penmanship
- Getting smart with flip charts

Approaches and tools

- CMS: Change Management Strategy (my own preferred, much revised and amended approach dating back to the late 1980s)
- Group centred decision support as in the Strategic Choice Approach of Friend and Hickling.
- MPA: multiple perspectives analysis from Hal Linstone (1984) –nowadays stakeholder analysis seems to be a quick and dirty version of MPA
- NGT: the Nominal Group Technique of Del Becq and Van de Ven dating from the 1970s

CMS: Supporting decision making and delivering change

Time



An angle on the problem is adopted

Options are created, identified, selected, and modelled

Draw up roll-out plans & proceed with delivery or roll-out)

D1: proceed with selected view of problem or go round again

D2: evaluate options & select preferred "answer"

D3: select preferred roll-out plan & execute (do it)

Key decisions have to be made at all stages along the way

Group centred decision support with the emphasis on process in the public and social sphere:

- Friend and Hickling: Planning Under Pressure by [John Friend](#), [Allen Hickling](#)
Elsevier Butterworth Heineman 3rd Edition 2005
- See also their website:
<http://www.btinternet.com/~stradspan/>
- See also “Faciliate.com” website and their tools and tips: <http://facilitate.com>

Multiple Perspectives Analysis

- Compare to today's very familiar use of stakeholder analysis, though the parallels are limited.
- Linstone, H.A. 1984 "Multiple Perspectives for Decision Making." Elsevier.
- <http://ieeexplore.ieee.org/Xplore/login.jsp?url=/iel5/17/18747/00865908.pdf?arnumber=865908>
- Linstone, H.A. 2000. "Decision making for technological executives: using multiple perspectives to improve performance " Engineering Management, IEEE Transactions. Volume 47, Issue 3, Aug 2000
Page(s):403 – 404
Digital Object Identifier 10.1109/TEM.2000.865908

The Nominal Group Technique (NGT)

- Originally developed by social psychologists in the 1960s (DeBecq and Van de Ven 1971) and can be seen as the pre -cursor of the (now) ubiquitous focus group
- Puts a high value on the judgement of the “common man”
- Centres on the dynamics of teams and “nominal” groups
- Quite widely used (and its variants) in community and social DM as a reliable and effective process for making public choices
- See

http://www.mycoted.com/Nominal_Group_Technique

Some sources

- Mayon-White Bill (ed). “Planning and Managing Change”. Paul Chapman Publishing. 1986.
- Mayon-White W.M. & Mabey C. (eds) 1993. “Managing change” 2nd edition. Paul Chapman Publishing/Sage. London
- Mayon-White W.M. 1994 “The ethics of change: manipulation or participation?” Business Ethics: a European Review. Vol 3. No 4. October 1994
- Mayon-White Bill 1990. “Study skills for managers” Paul Chapman Publishing. London.
- Suzanne Turner 2002. “Tools for Success” McGraw Hill. London

The JoHari references

- Luft, Joseph (1969). "Of Human Interaction," Palo Alto, CA:National Press, 177 pages.
- Group Processes: An introduction to Group Dynamics (Second Edition) (Paperback)
by Joseph Luft 1984

Tackling Strategic Problems.

Eden and Radford (Eds) 1990.

Sage Publishing. London

- Bill Mayon-White – Ch 8. Team members as agents of Change.
- Colin Eden - Ch 15. Managing the environment as a means to managing complexity *(reflects on the use of special spaces since the 1960s – going back to Stafford Beer’s “control room” in Allende’s Chile)*
- Chris Huxham – Ch 16 On trivialities in process *(of course these details are anything but trivialities)*
- Allen Hickling - Ch 17 “Decision Spaces”: A Scenario about designing appropriate room for group decision management. *(This is based on Allen’s experience on seeing and using the IERC building at Cranfield – where Bill M-W worked for a number of years)*

END of PART TWO

Q and A?

EXAMPLES and OTHER STUFF

The HR IS challenge

An example: HR and IS in a global media company

- SAP in place but poorly used
- HR under pressure to do more with less
- Pressure for better IM reporting from HQ
- No strategy in place for process improvement and better use of IT
- Team overwhelmed (almost)
- Strong culture of responding fast to business needs.

The intervention

- Initial set up
- Interviews and research with all SMT members
- Planned diagnostic review and design workshop
- Delivered diagnostic workshop (high cost to team (travel, business interruption etc.))
- Output:
 - Shared diagnosis of problems
 - Shared generation of solutions
 - Resources and motivation to deliver
 - Quick wins in place within three months
 - Two year work-plan resourced and under way in three months

The objectives: (generated at the start of day one) what do we want to achieve and decide?

Clarity in global HR IS strategy and how we get there

Understand complexity facing international

Articulate strategy and make it happen

Generally improve use of SAP and reduce re-work

Leave the workshop with a clear plan of action

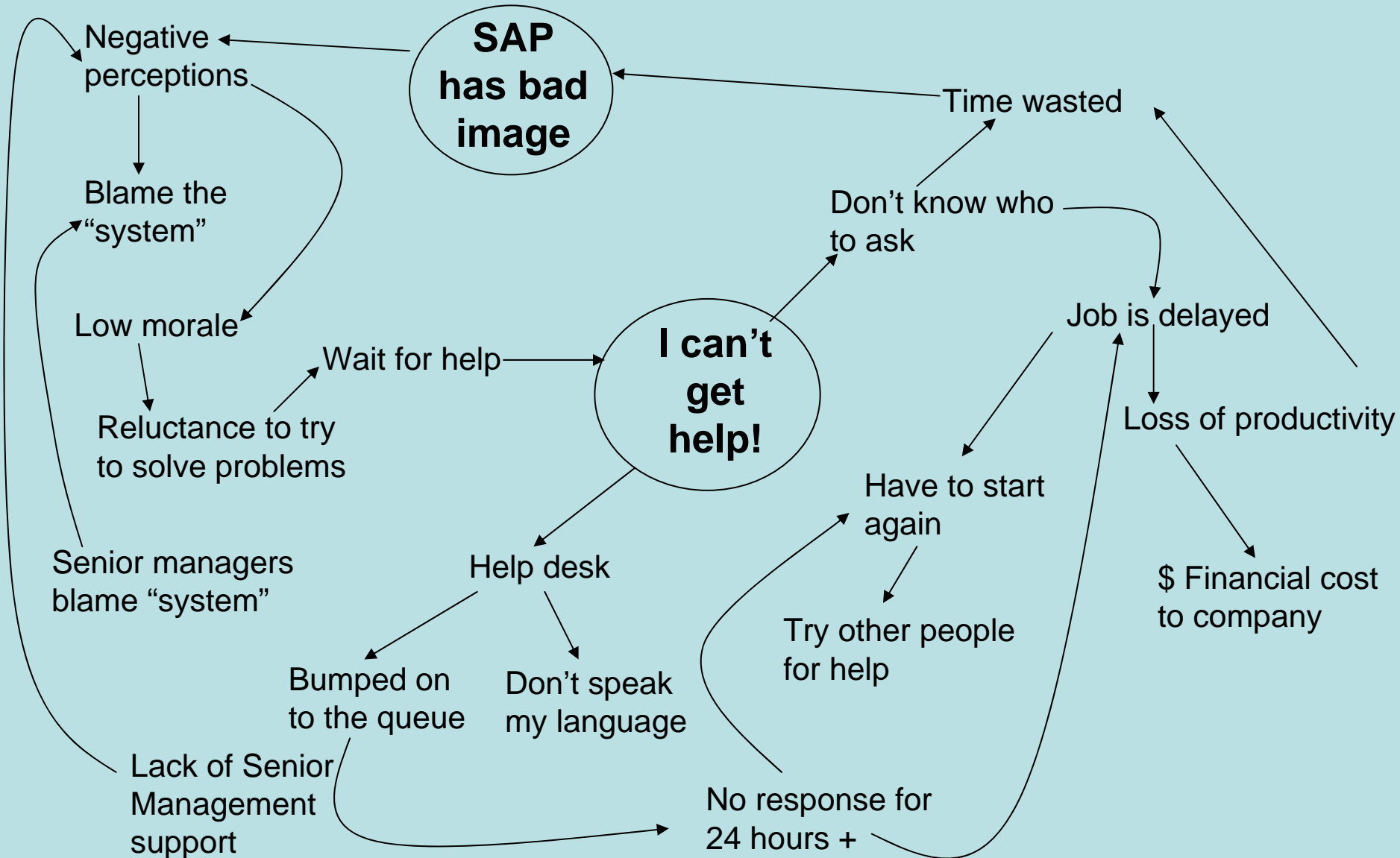
Road map for SAP use globally (US role imperative)

Be realistic – keep it simple and manageable

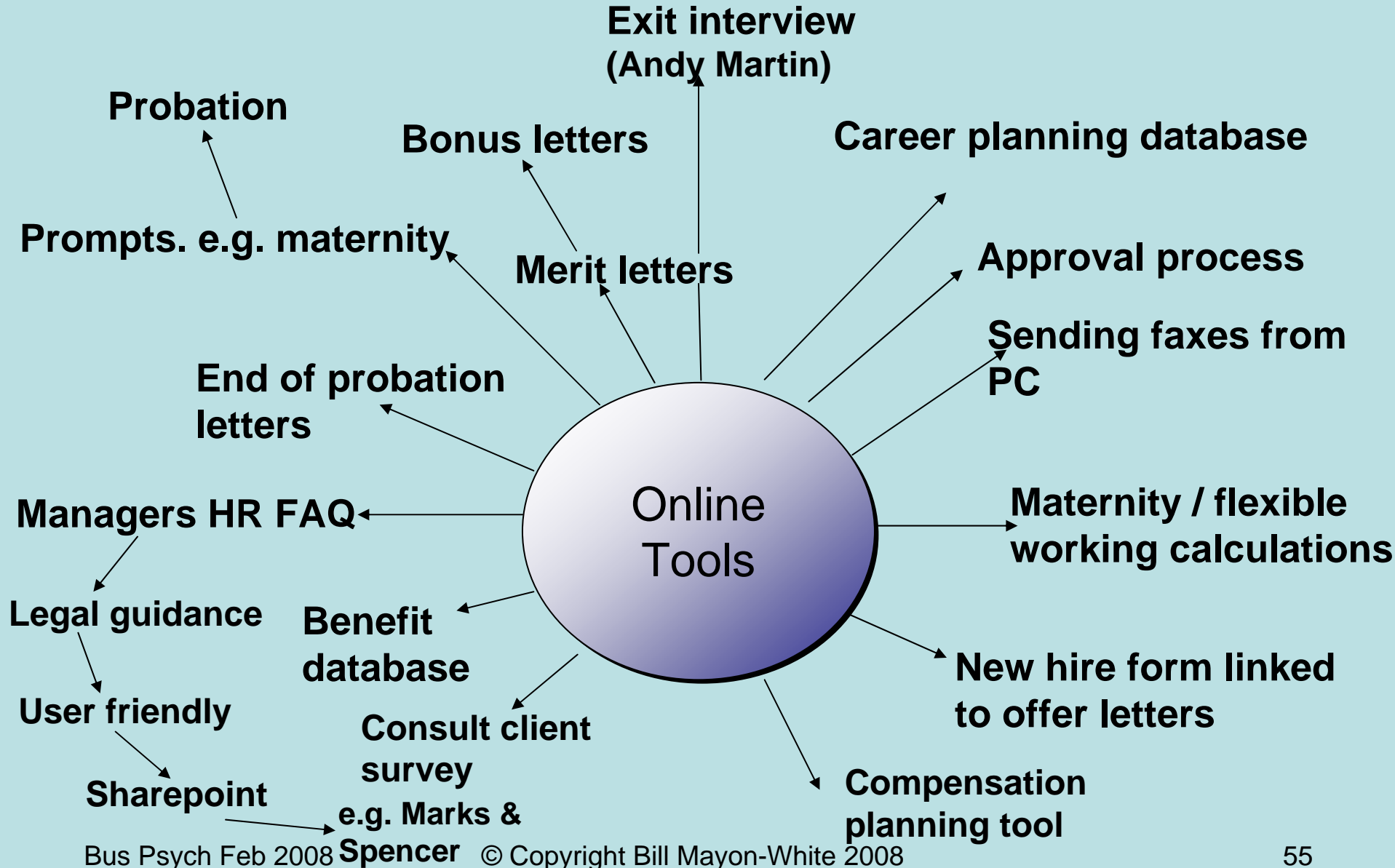
Decisions made about the future

Go away with engagement and passion for SAP, IS systems and seeing quick wins

Some of the Consequences cont'd



Scope for Online Tools



Dependencies Between Projects

