

## Learning from my consultant colleague

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I have spent time with my colleague who has worked with us as an agile consultant for a transformational project where we have deployed scaled agile (SAFe) framework. He has worked as an agile consultant for one of the assignments where we have been trying to adapt agile for a large division for a long time. I had the opportunity to closely work with him. I have written down a few of my observations and the approach a consultant takes for an assignment and how they get the work done in a certain stipulated timeline.

This has triggered certain thoughts about consulting as a profession to think about.

Can we also start our own consulting assignment? That thought triggers me to list some of the points and I have penned a few here.

According to Wikipedia - A consultant is a professional who provides professional or expert advice in a particular area.

The Management Consultancies Association (MCA) defines management consulting as: “The creation of value for organisations, through improved performance, achieved by providing objective advice and implementing business solutions.”

### 1. Why consultant?

No one likes changes. We don't like change because it upsets what's known—the rules, practices, and norms which we have gotten comfortable and familiar with. In addition, we are in control when events are the same. When work involves the same rules, practices, and processes, we know how to achieve our goals and be effective. But what happens when work changes in fundamental ways that require new skills and new capabilities, and the actual jobs we are good at are not just changed but eliminated because of trends in industry, commerce, innovation, or business?

As Woodrow Wilson, the twenty-eighth president of the United States, put it, “If you want to make enemies, try to change something”. Change is scary to most people; it takes them out of their comfort zones into a strange new world where their status and expertise are potentially under threat.

Change is all around us, and we often feel like a victim of it.

The world is changing very fast; we cannot wait and re-discover ourselves which can be done with the help of an expert.

Many people make the mistake of assuming that we have to force the whole company to be more agile in order to implement an agile development process. That is not necessarily the

case—a company needs to build its culture around whatever makes sense for the primary business that the company is in.

Who will simplify to do this type of cultural change in a much smoother way? Consultant/Third party agent?

If a company operates in an environment that requires some level of risk and/or regulatory control, it may be necessary to adapt the agile approach to fit that environment but it's not impossible to do that with the right approach and tools.

Who will understand the risks? Consultant / Third party agent?

We were looking for an expert who had already implemented agile in a transformational assignment at a large scale in multiple industries and who would not rediscover the wheel.

We were looking for a different set of knowledge, skills and attitude. He/she can influence mass team members in various ways to change the mindset and efficiently execute the transformational project.

Agile consultants are providing modular solution based on our need from Training to complete the transformation journey.

## 2. What benefit and value a consultant can add?

A consultant is well served by a ready set of stories, examples, and metaphors to assist in communicating techniques and approaches to make organizations more effective.

Usually, after first meeting with the client, the consultant develops a written proposal that includes a project plan that specifies the goals of the project and the activities that must be conducted to achieve those goals.

Consultant is hired based on client's perception of the quality of the proposed project plan. However, in the vast majority of successful projects, the initial project plan is changed as consultant and client work together to address the issues in the client's organization.

An experienced consultant learns to present the project plan as preliminary in nature and open to change. The consultant helps the client to realize that plans often change and that change is natural.

Consultants are hired as temporary employees because it was the only way to staff a project rapidly enough with qualified specialists. Today many companies hire contract professionals because it makes better economic and business sense. It is far less expensive to staff up with temporaries than to hire and train new employees. Contracting imposes virtually no obligations on the client beyond paying the contractor for providing the contract labor.

### 3. Essential requirements to operate?

These are the things that a consultant must have as a minimum to start the operation. Some people call them 'must want'. If we do not get an essential want from a client, then we would do better not to proceed with the project.

Essentials vary from situation to situation; here are some examples:

- Access to the key people who have a part in the problem the consultant is being asked to solve
- Contract paper about the work (Thorough description about the scope of the work, terms and condition, mutually accepted)
- Enough time to do the job professionally
- An agreement that he will not be asked to individually evaluate the performance of people he works with on this project
- Money
- Access to certain records and documents
- The commitment of the top person in the organization to proceed with the project
- Response to phone calls and e-mails.

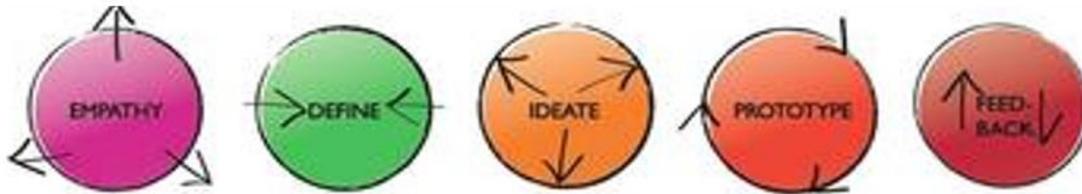
### 4. How consultant starts the assignment?



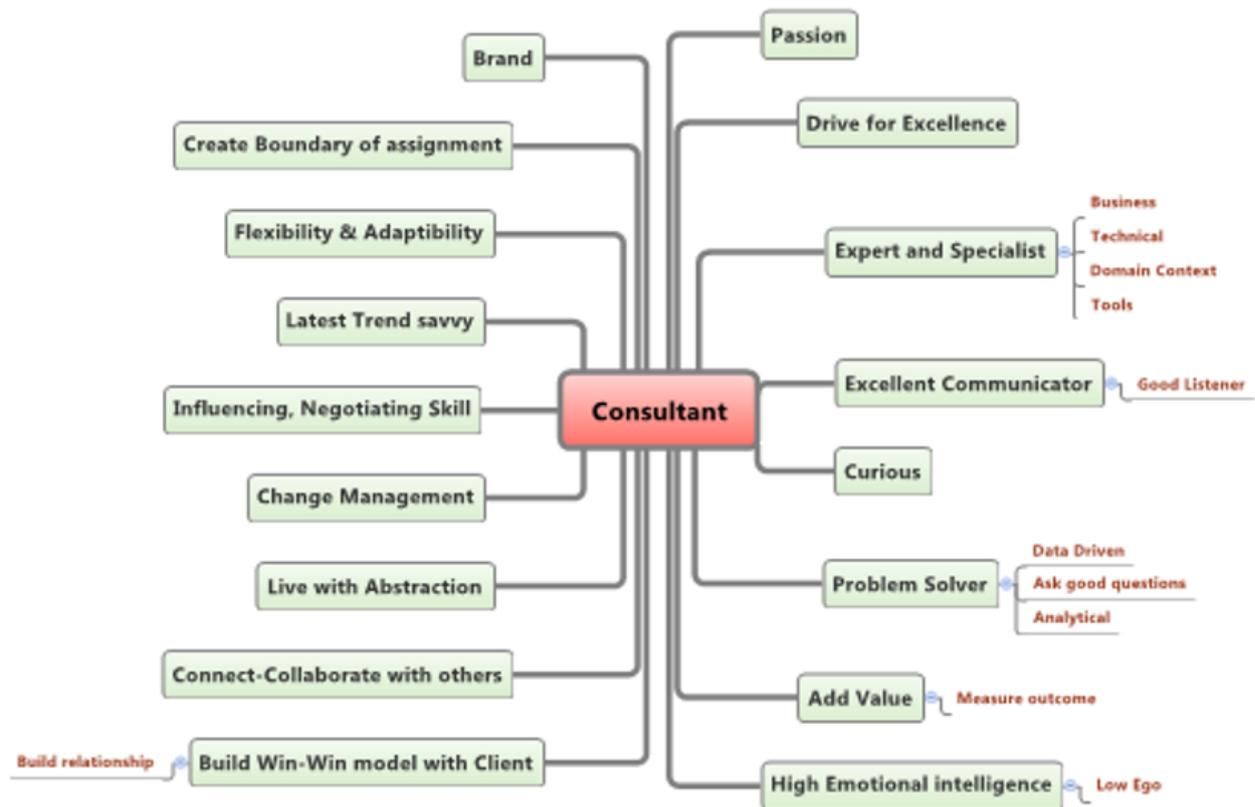
**Fig a: Problem Solving Process and Flow**

Typical way consultant starts the work that I have observed: they first understand the problem in the context it is happening. They do the gap analysis and based on that they propose solution and check the validity of the solution. If there are changes required, they fix and iterate the same process. What are the differentiation factors? We have observed that analyzing abilities and proposing the right fitment are key, which are unique for the context.

This is like Design Thinking (DT) which is a more human-centered, rapid prototype-based innovation method. Its main idea is to develop a solution in close exchange with stakeholders and target users to ensure desirability, viability, and feasibility of the final solution. All consultants apply similar types of practices.



**Fig b: Design Thinking Process and Applicability into problem solving mechanism**



**Fig c: Skills require to become an Effective Consultant.**

By definition, being a consultant—and not a manager—means we have direct control and responsibility only for our own time and our own support resources. The line manager is paid to take responsibility for what the line organization implements or doesn't implement. If the client manager takes your report and chooses to do nothing about it, that is the manager's right. In the final analysis, you are not responsible for the use of your expertise and recommendations.

Below are a few observations I have made.

Fig c: captures most of the skills required to run a smooth consultancy assignment which need to polish an ongoing basis.



**Fig d: Why? Why? Why? Why? And Why? Develop better questioning skill.**

## 5. Curiosity skill

Customers don't always know what they want. But even if they know what they want, they sometimes don't communicate it clearly. Furthermore, what they say they want may not be the best solution to their problem. Therefore, information gathering is a key consulting skill. This skill entails the ability to draw pertinent information from customers, even if they don't know the information is pertinent or wouldn't otherwise think to tell you.

Consultants use several types of questions, such as those listed below, to draw information from customers. Used in combination, these types of questions can generate more information and better quality information

**Investigative questions:** Helps us to learn more about the problem or situation under discussion. For example:

- "Can you give me a specific example of what you mean?"
- "What sorts of things have you already tried to resolve this situation?"

Investigative questions are open-ended, tell-me-more questions that swiftly queries the customer for surplus data. What was the history of the problem, problems with the existing procedure, the results of other attempts to solve the problem, and conditions for success?

**Expounding questions:** Helps us to offer a way to double-check your understanding of what the customer has told you. For example:

- "Do I understand correctly that what you're saying is ...?"
- "When you say there are communication problems, what do you mean?"

These questions signal that you're really listening and provide an opportunity for clarification if you've misunderstood something. They also prompt the customer to add some information even if you haven't misjudged.

**Procedure questions:** Helps us to ensure that the customer is comfortable with the way you're conducting the interview. Just a few such questions may suffice. For example:

- "Do you have any concerns about what we've discussed so far?"
- "Would you like some time to mull it over?"

Process questions tell customers that it's OK to have opinions about the conduct of the interview, and to express those opinions. These questions help to put your customer at ease, and customers who are at ease are more likely to expound at length than those who feel they're undergoing an interrogation.

**Sympathetic questions** offer a way to build rapport by focusing attention on the customer. They are a simple and very effective way to exhibit a sense of caring during the interview. For example:

- "Is this a really frustrating situation for you?"
- "It sounds like you're constantly juggling priorities."

Just a little bit of empathy can go a long way in making a human connection. And it's not unusual for customers to respond to expressions of empathy with, "You're right, and as a matter of fact," thus giving you additional information that you might not have gotten otherwise.

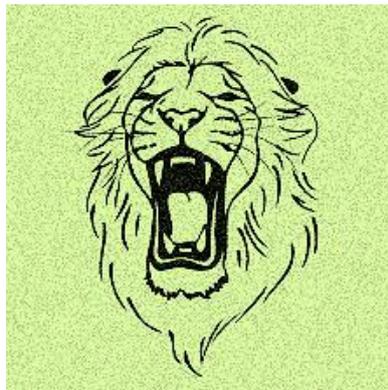
**Meta-questions** are questions about the questioning process. They are a creative way to help customers remember important information they might not otherwise remember to mention until it's too late. For example:

- "What question will your staff wish I had asked you?"
- "If we get started with the information I now have, what question will we later wish I had asked?"

When we can smoothly incorporate these types of questions into our information-gathering sessions, we will be pleased with the amount and quality of information that we generate.

## 6. Communicate Powerfully - Nonverbally

The ability to communicate effectively with the team members of the client is vital in order to create positive relationships and gain a good understanding of their needs. Consultants should be very good at communication. Verbal and nonverbal both types, this is the only way they can get the work done faster with greater execution speed. How fast a consultant can build relationship with the team members is a key to their success. Mostly they are natural and good at this communication skill. And because of this natural outstanding communication, talent Impact is also very high towards the team members.



**Fig d.1: demonstrates that some time message has to express in different way**

Agile practices, value generation and examples are said effectively, communicated in different instances and set examples in several occasion so that message transferred appropriately.

## 7. Signal to noise ratio

In electronics engineering, the preferred approach to improve the measurement of a desired signal is to minimize the interference of background noise. This means working with the client to specify only that information that you have a process to use. Signal is the expected and noise is something which is not expected. It is easy to get caught in the trap of wanting to absorb all the available information and then decide how to use it. Stick to your information management and analysis plan and the noise will decrease.

Consultants are having razor sharp ability to catch the relevant information and ignore the noise which they have built over a period of time through their experience.

## 8. Specialization

The differentiating factor each consultant brings is depth of knowledge in the subject where they are operating.

In our context it was agile deployment in our domain context which was different.

Consultant was aware about all the potholes and ready to do research and learn from the experiment with the team members.

Consultant should bring to the table something unique, be it technology skill, process skill, thinking skill or solving skill which is unique.

## 9. Appreciate often

Consultants, by nature, look for flaws and, consequently, improvement opportunities in every situation. Consultants are trained to see the downside of people and processes, but that doesn't mean they have to carry that perception over into the dealing with the colleagues.

Wherever they find opportunity they should appreciate people and help them to improve the situation. Through this process they get permanent connection with each individual.

## 10. Challenges the assumption: Always Assume Assumptions Are Wrong

I have observed, consultants are not easily convinced, every time all the assumption has been double checked. It is all too easy, after years of experience, to be impressed with the knowledge and comfortable with believing we "have seen this case a thousand times before." To keep this in check, a professional has processes in place, maybe even formal ones, to challenge and verify all the assumptions made on the way to a diagnosis. Document every aspect in a tool. In our context all the data were available in version control tool "Team foundation server" where everyone could refer and update the data.

## 11. Data driven decision making with caution

Data is critical for any decision making where we avoid mistake not by taking based on gut feeling. Most of the decision in our team whenever taken, wherever taken, based on the available data from the tool. Be it product portfolio, team velocity or any other business decision taken, we have observe it was based on the facts. Some people related issues are not so with quantified measurement where emotional aspects involved. Carefully analysis has been done to make certain decision by looking at other non-visible aspects.

## 12. Using technology for managing self competently

Everyone in the team should be encouraged by the consultant to use the technology at fullest extent, be it smart phone or other gadgets which enhance visibility, productivity, collaboration etc. All the laptops were web-enabled with Lync messenger. Meet with smart phone cameras if required. Capture camera image as an attachment with product backlog, code review with remote desktop sharing, etc. By all possible means, technology has been used to improve collaboration, communication and productivity.

Initially all teams members were not part of this initiative; it took some time to on board all the team members.

### 13. Simplify everything

Albert Einstein's advice was to "Make things as simple as possible, but not simpler." I have observed that the greatest skill a consultant brings is that consultant can visualize the problem in much simpler way and communicate the same to the team members. From an abstract problem to a crystal clear solution is an art and process of maturity which helps team members to execute the assignment faster.

### 14. Inspirational video for presentation, excellent and unique power point presentation skill

Consultant tells stories from life experience so that concepts are easily digestible. Tell and retell the story and find the impact which will be always very high. Telling story is easiest way to connect with the human being as same practice has been followed for last couple of centuries.

So most of the time they start “let me tell you a story how we had handle similar type of challenges in blah blah...” which helps team to understand the morale of the story.

There are several presentation session planned for communicate various theme, concept where presentation created wow affect among team members.



**Fig d.1.1: Conveying the moral through stories**

Show video and tell inspirational story from that.

### 15. Constantly Adding Value

“The first thing you’ve got to do, before you can say whether you are adding value, is get a definition of what added value means to your key stakeholders.”

“We should never lose sight of the fact that we do not define value. It’s our stakeholders who define what value is”

All consultants first figure out value definition.

- Map out what, precisely, stakeholders value and do not value;
- Take into account how things are done, not just what is done;

And later mapped how the value generation can be realized in minimal timeline.

## 16. Negotiate Effectively

If you can't get your client or other stakeholders to buy into the plan, idea, or strategy, then the forward movement stops there. Take help from the others; understand who can help and make a strong team, at the end work has to be done.

In every initiative a consultant takes, negotiation is the key where the consultant is selling a solution to get buy-in.

Team members will ask “Why should I listen to you? Follow you? What I will get in return?” Consultant has to influence all team members by answering these questions.

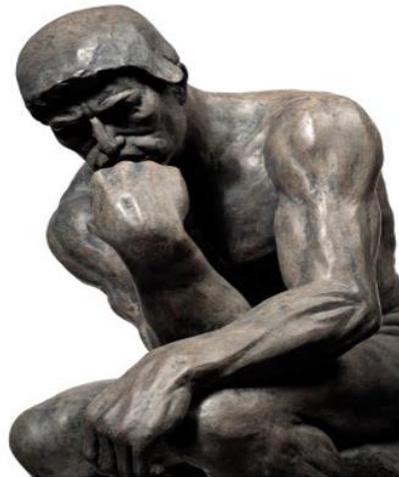


**Fig d.1: Collaboration skills which will be used greatly**

## 17. Natural Curiosity and big WHY?

There are several steps we were doing in the agile initiative which are very standard. We have learned from the consultant to ask BIG “why” questions for each of our initiative: What is the ROI for each step? What are various ways we are getting benefit in value generation?

Why, Why and Why we are doing these? Tell me why? Tell me why? And until we are comfortable we need to ask and understand the holistic thinking about each step and that should be part of natural thinking.



**Fig e: Discuss and solve issues currently team is facing, treat every activity is a great thinking process**

The *five whys* method is a good approach for digging into a customer to get to the root of the problem. The idea is that by progressively asking “why” over-and-over again, you eventually get to the root cause of the problem.

## 18. Time management

Efficient meeting running is one of the keys. Consultant has to conduct several meetings to get to the real crux of the problem. He/she has to follow and walk-the-talk about time management. How do teams conduct various workshops like agile architecture, portfolio, release train readiness, inspect and adapt workshop. etc.? He / she should be running all these meeting as an efficient process that adds value faster without wasting much time.

Everyone is watching!! So perform as a world class player, flawlessly.

## 19. Spend time for teaming activities

Lightning presentations, monthly newsletters, etc. are ways a consultant broadcasts his/her thoughts and connects with the bigger forum and members. They do different types of events to get along with team members and to connect with the all the people. In a process team transformation starts building up.

Celebrating more often at demo day, birthday party or team outing will increase team bonding. After several such events it is much easier to communicate and pass the message to most of the team members and automatic buy-in will be there.

## 20. Power of Observation

Ability to see the trees in the forest and vice versa in a given context is a great skill. That requires practice to see what we want to see and help others to see the required part. Consultants are usually well practiced in finding what they are looking for. Improvement idea, issues, gaps, all these could help them figure out based on their expertise and experience.

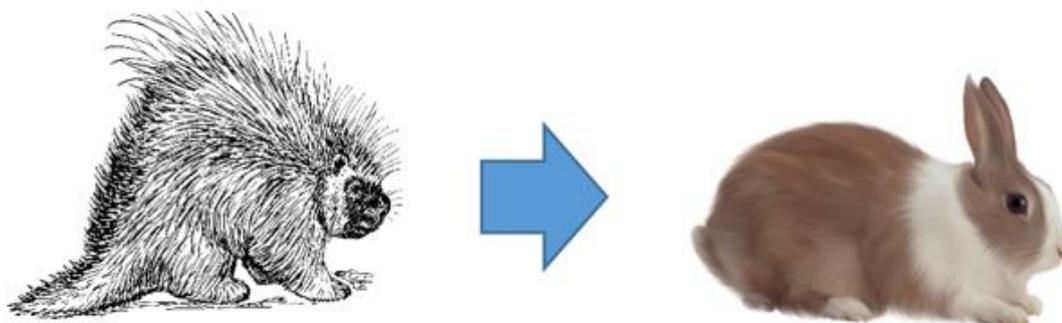


**Fig e.1: Can we find family members from this picture?**

The more we practice, the more observation skills will develop.

## 21. Ego-Less Personality

Relationship is the key in consulting work. In the servant leadership style consultant were executing the work, helping the team members, several time same concept has been repeated, demonstrated. Agile transformation require to deal with people mindset which is tough to change and time consuming activities.



**Fig f: Improve Likeability factor**

How easily a consultant can become a likeable person in a short time is a skill that has a “wow” factor.

## 22. WYSIWYG (What You See Is What You Get), WYGIWYS (What You Get Is What You See), We Can't See What We Don't Look For

Consultant capture all the details information, show the same in most of the visible places and emphasis the same practice all the possible places. Be it a requirement writing, demo meeting, code check-in comments everywhere all the team members should be able to see, visualize, feel what we are talking about.

Nothing is in air. Teams try to meet the reality as early as possible, from discussion to working deliverables. All the tool, dashboard and story board all spreading different messages which are visible for the team to make right decision.

## 23. Tools

One of the best tools used is the six sigma tool “Define, Measure, Analyze, Improve, Control”. It can be the best way to start with any consultant.

The Theory of Constraints is a management philosophy that is based around the idea that the throughput of all systems is limited by at least one constraint: a bottleneck that slows production. So discover the bottleneck and solve it. Some others will appear; solve them next and learn from each event.

There are many tools but mostly we used the Kanban tool below to track work progress and identify roadblocks. Any item that was a long time in work in progress, team prioritized to solve the issue and clear the line.

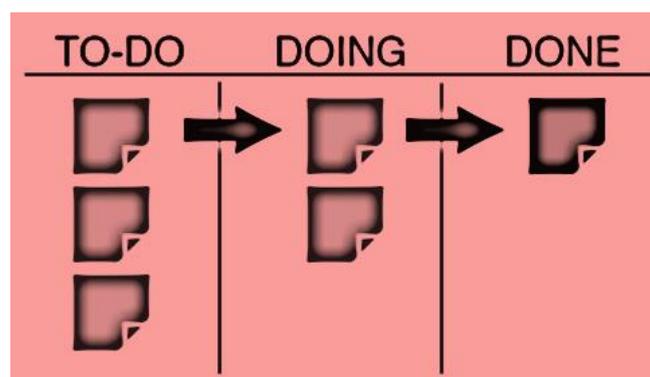


Fig g: Kanban board to measure progress

## 24. Networking

All consultants are highly networked with the colleagues with whom they discuss the latest happenings and probable learning opportunities from each event. Internal networks, communications and support groups provide opportunities to stay abreast of new developments. They keep sharing their learnings and learn from each other.

Most of the information or working solutions flow through those channels. Someone might have already done it, so why reinvent the wheel again?

## 25. Produce result not only per hrs. billing cost

Consultant has to produce output which is quantifiable and with absolutely no mistakes at all in work product and measurable. The endurance of the consultant is based on deliverables, not based on per hour billing. Most of the time a consultant adds value on a daily basis.

Deliverables and artifacts are aligned, agreed and accepted with the client. A few initiatives are not directly measurement, but there are indirect results in transformation process.

## 26. Coaching

Coaching is one the most important aspects of consulting. Coaching is a five-step process. Under a humanistic approach, Flaherty cited in Bartlett, suggests that the ‘flow of coaching’ includes five consequent steps:

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- 
- (a) Establishing relationship,
  - (b) Recognizing opening,
  - (c) observe/assess,
  - (d) Enroll client,
  - And (e) coaching conversations.
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Natale and Diamante suggest that the coaching process consists of five stages, too:

- (a) The ‘alliance check’, --→
- (b) The ‘credibility assessment’,
- (c) The ‘likeability link’,
- →(d) The ‘dialogue and skill acquisition’,
- And (e) the ‘cue-based action plans’

There are many but all these styles have been applied to coach team members. Once a consultant coaches team members, he/she act as a catalyst in the transformation process.



**Fig h: Consultant as a CATALIST**

As consultants are hired for a specific target purpose, they become a change agent and act as a catalyst in the transformation journey.

## 27. Measurement

What we measure we can improve; if we cannot measure we do not know how to improve. Consultant has to figure out measurement parameters for every assignment.

How does an agile consultant measure the readiness of the transformation process and what are the measurement factors?

- Current level of organization status
- Current readiness to adapt agile
- Organization maturity
- Vision for the organization

All measurement data has to incrementally add value to the organization when team members automatically fill in this information.

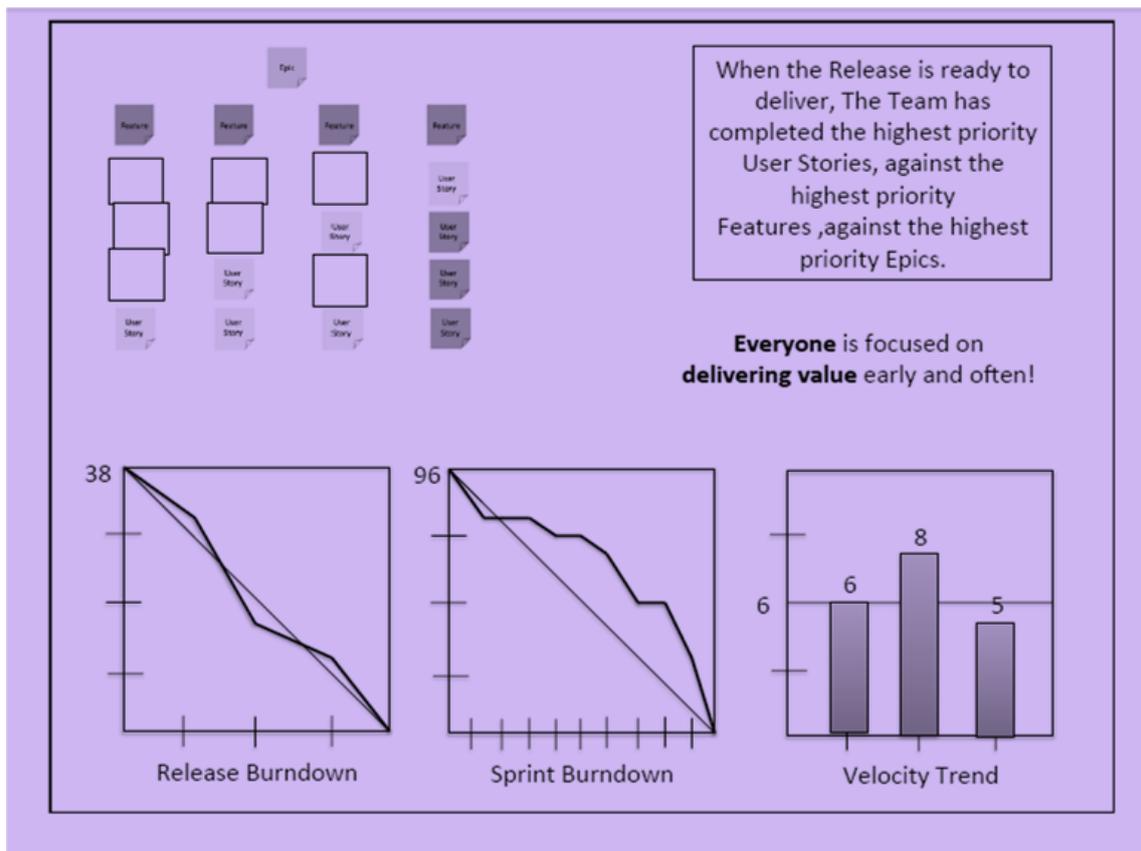


Fig i: what should we measure to demonstrate agile transformation progress

## 28. Measurement for success

There are various ways to measure the success and work done at the end of assignment. Below are a few identified ways to look at the result.

- People are more agile and able to drive on their own.
- People understand underlying value. People issues are resolved and upper management better understand the agile way of working.
- Several potential coaches have been groomed to solve the next level of problems.
- "Practice what has been preached".
- Transformational journey has started and path established.
- Reduced delivery cycle time.
- Self-disciplined team members own delivery and improved team productivity
- Long-term organizational success is sustainable
- Team is more supportive of customer collaboration and they do frequent interactions with customer

At the end I will recommend this consultant to be hired again for similar type assignments for another project. I have kept most of the information at an abstract level and nothing is mentioned

about the specific project, business, product or technology. More specific parts are confidential. I tried to be as generic as possible only to highlight the skills and techniques.

## 29. Conclusion

These are my observations and learnings which I have captured. I have not disclosed any information about the assignment and details; all the information is generic about consultancy work. Some of my observations can be reused and applied based on the context. I have not described anything new or unique. All of us know about all these skills. I have tried to capture the points in a systematic manner so that all the approaches and processes can be practiced again and again. I am sincerely starting to practice these identified skills for my next assignment.

## About the Author



### **Chandan Lal Patary**

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**Mr. Chandan Lal Patary** is currently working as agile coach and Global Program manager at ABB. He has deep experience in developing Software products across various domains and has successfully executed many Projects. Chandan has worked on domain like Healthcare, Aerospace, Building automation, Power automation, Industrial Automaton under real time mission critical product development to large scale application development. Chandan has 16+ years of industry experience. He is certified PMP from 2008, Green Belt certified holder from 2005. Chandan is an agile practitioner and Certified Scrum Master from 2011. Chandan holds a Bachelor's degree from the National Institute of Technology (National Institute of Technology –Agartala, Tripura) in Electrical Engineering-1998. He has completed one year of Executive General Management program from the Indian Institute of Management-Bangalore, Karnataka in 2007. He has published several management papers. He can be reached through email/LinkedIn: [patarychandan@gmail.com](mailto:patarychandan@gmail.com)