

A Failed Consultation

PART 2: WHY DID IT HAPPEN?

EDITOR'S NOTE

In C2M's June 2001 issue, in Part 1, William Czander reported his experience as consultant in attempting to satisfy the requirements of a client university. The resulting engagement was characterized by the author as a failure, and the question was raised as to how and why that came to pass. In Part 2, Czander provides his own explanation and interpretation. This is followed by contributions from three readers, who responded to our invitation to present their own views.

Insights from Self-Reflection

Why do consultations fail? A consultant can look in many places. As an experienced consultant and a practicing psychoanalyst, I maintain that an analysis of a failure must begin with the consultant. He or she must be able to engage in self-reflection. When doing so, I try to answer the following questions:

- Why did I take on this particular consultation?
- What is going on in my personal life that has made it difficult for me to be cautious and thoughtful?
- What is it about the consultee(s) that may have triggered a reaction?

The ideal self-analysis and perhaps the most difficult question to answer is:

- What is it about my background, early issues, and unresolved conflicts that come up during the consultation and diminish my

capacity to work or perceive things clearly, or that cause blind spots?

Over the years, consultants have come to me when they are in trouble: Sometimes they have accepted a consultation and feel they are over their head and lost. Our work usually focuses on characteristics of the consultation process that they find particularly burdensome. I encourage them to write down their emotional reactions immediately after a consultative visit. We then explore the nature of these reactions and how they may be influencing their perceptions, neutrality, or objectivity or causing them to be “stuck.”

It is vital for a consultant to be aware of his or her blind spots. Mine are caused by two unrelated factors. The first is a feeling of omnipotence. At the time of this consultation I was feeling at the peak of my career: I had written a successful book, I was appointed to a chair at the college where I taught, I had just completed a successful consultation where I was described by the CEO as “brilliant,” the soccer team I coached was undefeated, and I had recently fathered a child at the age of 50.

■
*Failure can
be the key
to success
in the
long run.*

My second blind spot was a function of my reaction to the Director. We all have reactions to certain types of personalities. I have a history of reacting to the so-called narcissistic leader.

Self-reflection, often called introspection, is a capacity. Like all capacities, it is sometimes with us and sometimes lost or weakened. Knowing when we have lost this capacity is the key to being continually successful. There are things that go on in our personal and professional life that impact and diminish our introspective capacities. There are also things that go on in the consultative process that will diminish our introspective capacities. Losing this capacity increases the likelihood of failure.

This is what I learned: I failed because I allowed my personal feelings to color my perceptions. I did not follow the structure and process I typically use during consultations. And the caution I normally maintain in accepting and engaging in a consultation was tossed aside. Perhaps the greatest neglect in this failure was the fact that I did not talk to or seek the help of a colleague. I went alone. I learned that if I accept a consultation, and if I operate alone, I am riding feelings of omnipotence and heading for trouble. Seeking and maintaining a trusted and open relationship with a colleague or a group of colleagues is a necessary professional edge.

William Czander

Not a Failure

Although I like the interactive nature of the C2M approach and enjoyed the thought process that went into my response, I would not presume to “second guess” this case, except that I had contract security forces of the type described under my control during part of my career.

To begin, I do *not* consider the consultation a “failure.” This is because I am presuming that the Consultant would feel obligated to work further with the University, to determine the root causes of the problems in the security orga-

nization, and develop a correction strategy based on the findings. A strategy that may or may not have included team meetings of the type described in the article. No consultant I know would willingly walk away at that point—not from the chance to help an organization whose duties include prevention of rapes, robberies, and fights.

Why did this consultation fail?

What could the consultant have done to avoid this failure?

Having said that I do not consider this assignment a “failure” (yet), I will describe why I believe that the assignment *got off to an unsuccessful start*. Here are my suggested problem areas and possible solutions:

The Executive Director (arguably part of the problem) should not have been the Client, and the Training Director should not have been involved in guiding the engagement. The actual client, to whom the Consultant would have had reporting responsibilities should have been the University President.

A meeting/seminar might have been part of the consulting engagement, but it should not have been the only deliverable. The Consultant suggested this by mentioning the previous consulting engagement (another meeting), which proved unsuccessful. Based on similar experience in my own career, I would have proposed an approach that included a period of observation/interaction with the security personnel on their shifts, including shift briefings, shift turnovers, riding in the patrol cars, etc. The “quasimilitary setting” includes established lines of communication that should not have needed development or modification.

I would also have proposed meeting with what the Consultant called “high-level administrators” to determine how the security organization was viewed by the organization(s) it supports.

The Director and the Director of Training should not have attended the meeting (everybody knows that). At worst, when it was evident that gainful interaction was frustrated by their attendance, the Consultant should have (privately) asked the two to leave, going on to say that for them to remain violated the terms

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of the agreement. Nonconcurrency by the directors would have allowed the Consultant to legally terminate the engagement short of failure, saving his own reputation, and/or finally getting their attention.

What was it about the consultant that precipitated the failure?(It's a failure only if it's over!)

Again, the Client for the engagement should have been the University President. It is unlikely that engagement findings and recommendations would have ever gotten beyond the Executive Director.

The agreed-upon scope of work should have been determined after the Consultant had an opportunity to become familiar with the organization. Even if "communications" was the root problem, it is unlikely that a weekend meeting would have been the solution, especially if it was really perceived to be little more than an all-expense-paid weekend getaway.

The above notwithstanding, the meeting might have been of limited value if the directors had been kept out or asked to withdraw. The meeting then might have at least surfaced deeper problems that impacted communications.

Was it simply the client's desire to avoid change?

I believe the only change the "Client" feared was losing his job, which would be a definite possibility if the University President had been the Client. Too often, I have had to include in my report when a manager was (in my estimation) not equal to the challenge.

Also, it definitely appeared that the Consultant was going to be (as he said) "sabotaged." That would have vindicated the work of the Director, not to mention damaging the reputation of the Consultant.

Was it the inability of the consultant to assess the personality of the director?

I believe the Consultant accurately assessed the Director's personality. That should have been reason enough for insisting on the University President as the Client or for declining the engagement completely.

Or was it something else?

As I suggested at the beginning, the assignment will be a failure only if it ends with the meeting. The Consultant should come back with an alternative proposal based on his assessment of the situation and what he believes to be an effective course of action. If he does not consider himself right for the assignment, or no longer can fit it into his schedule, he should recommend a qualified substitute.

If he does that, he will have done what he could, and it will not be a failure.

Gene Razzetti CMC

Negotiation, Confrontation, Communication

In response to Dr. C's woulda-coulda-shoulda column, he should have:

1. Discovered the provenance of Dr. O and called him to assess the client.
2. Negotiated with the Director or his obviously trusted assistant directly, not with the powerless Director of Training.
3. Issued the invitations to the officers, stating the goals and conditions, that the executives were to be excluded and that the event would not be a vacation. Instead he passively relied on the executives to communicate faithfully when they had never done so before.
4. On the spot, threatened that the Director would not achieve the improvement he sought unless he allowed Dr. C to carry out the agreed-upon treatment and that he was risking a suit for breach of contract.
5. Following up, stuck his head in the assembly room door and said that he was leaving immediately and why.

Dr. C is apparently not confrontational, but his clients could have benefited from being confronted.

This case was so interesting that I found myself disappointed upon discovering that it was "to be continued." Now I must wait months before I can send the article and its conclusion

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LEW CROCKER CMC is currently retired in central Oregon. His fondest memories are of the several consulting-related opportunities that enabled him to assist certain worthy client personnel to realize advancement in their careers.

as a cautionary tale to my son-in-law, an executive at a metropolitan police department.

Samuel R. Phillips PE, CMC

A Similar Incident

During my 25 years as a management consultant, I found that poor communications were a cause of a great many of the problems I encountered. In response to the request for comments on Part 1 of William Czander's "Failed Consultation" experience, I will recite the story of a somewhat similar incident in which the technique employed proved to be successful.

I was invited, as an unbiased consultant, to dismantle the wall of deep animosity that had developed between city council members and the senior members of the city staff in a com-

munity of some 90,000 residents in the Los Angeles area. I first privately interviewed each of the council and staff individuals to unveil the causes of their antagonisms. Next, I arranged a weekend in a resort hotel in another city so as to spend Saturday with the council members and the following day with the council and staff members together.

At about midday on Saturday, the ice was broken by the most honestly astute council member, who responded to my recitation of the staff's complaints by volunteering that he was a leading offender. This led to similar confessions of shortcomings by the others.

On Sunday, upon hearing the council members' admissions, the staff members responded in kind. The conclusion was unanimous agreement by all that the real cause of the problems was faulty communications. The session ended that afternoon with friendly, full agreement on a fresh start.

Lew Crocker CMC

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*Consulting failure,
learning from; Consultant
performance*



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