MSOD 622 Post Course Reflection Paper

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Part A – Reflection on Consulting.

Our learning group, The Starlings, worked with the National Beer Wholesalers Association (the Association) on a three-day consulting engagement. A stated strategic priority of the Association was to grow the business and outreach of the Center for Alcohol Policy (the Center), a separate nonprofit entity supported and funded by the association. The presenting request, made by the Chief Financial Officer on behalf of the Chief Executive Officer, was for our group to document the work done by the Association staff on behalf of the Center, assess the feasibility of creating a new full-time internal executive director position for the Center, and to provide a job description and recommended reporting structure for the anticipated position.

Our learning group managed this assignment on three operating levels: (1) managing the consulting process (i.e., framework and tasks), (2) managing the consulting relationship with the client, and (3) managing ourselves and our interactions as a group (Rhodes, K. & McCollum, J., 2018, s. 7). Foundational to the entire consulting experience were the shared knowledge and experience gained from the course content and learning activities offered in the Washington, D.C. intensive, the prior two MSOD intensives in Pájaro, and the collective life experience, skills, and perspectives of the learning group.

Our group followed an integrated consulting methodology based on Peter Block's five-phased consulting process model (Block, 2011) and Edgar Schein's Process Consultation theory and ten principles (Schein, 2008). Given the scope and time constraints of the three-day engagement, the group limited its focus on the first three phases of Block's consulting process—(1) Entry and Contracting, (2) Discovery and Dialogue, and (3) Analysis and the Decision to Act—which culminated in the delivery of a set of recommendations and proposed next steps to the client.

In each phase of the process the group intentionally allowed its attention to shift dynamically across the three operating levels as called for in the moment. Using check-ins and inquiry, the group periodically paused to address issues in each area as they emerged. Sometimes the issue revolved around managing feelings that were often triggered by the intensity of the work environment. Other times a process check was in order when the group felt “stuck” in performing a task or spending too much time on a detail or tangential issue. Still other times the group would pause to consider the implications of our proposed actions on the client.

This shift would show up organically, almost intuitively, and occasionally in unexpected and spontaneous ways. For example, when the stress level would begin to increase during a group discussion about a client issue, or the energy level would start to wane during a project planning brainstorming session, it was a group norm to momentarily suspend the activity to engage in a self-care intervention. These interventions took many forms, e.g., a moment of silence and reflection, a Qigong exercise (a.k.a. “Dr. Julie’s Loving Hand Slap”), “happy dancing” to rousing music, taking a brisk walk to clear one’s head, and—my favorite—junk food binging on Cheetos, pretzels, and chocolate.

The project timeline was straightforward: three phases in three days. One day was allocated for each phase. Each day started in the late afternoon preparing for client meetings the next morning and concluded by 1:00 p.m. the following day.

On the first day, the learning group reviewed the basic requirements and key tasks of the Contracting phase and discussed questions around self-management. A critical issue was how we would define our roles and organize ourselves to best support the needs of the client while simultaneously attending to the developmental needs of the individual group members.

Block acknowledges the importance of selecting an appropriate consulting role type—*expert*, *pair of hands*, or *collaborative*—based on the client's style, the nature of the task, and one's personal preference (Block, 2011, pp. 22-27). The group believed the best way to serve the client was through a collaborative role, which supported the interdependency between the group and the client, bilateral decision making, and two-way communication. This collaborative helping relationship was reinforced throughout the engagement and during the final report out with the client sponsors by offering to help them as partners to come up with an action plan to support our recommended next steps.

The group made a conscious decision to appoint two co-leads, a male and a female, who would guide the client discussions and be the points of contact with the client. The rest of the team would support the co-leads, provide subject matter expertise, and perform delegated project tasks. This structure was effective. It offered a clear, unambiguous, and consistent face to the client, streamlined the decision-making around functions, while at the same time, allowing for interaction, input and feedback among the team members.

At a secondary level, the individual role assignments of the group were intentionally selected to enable learning growth in areas of discomfort and unfamiliarity. The group shared the responsibility for providing the psychological safety and trust to allow individual self-exploration around triggers and fears. The shared developmental goal was to gain vital experience and build confidence in performing our roles in the context of a consulting engagement.

Given my background and experience in consulting internally with executive leaders and leading complex process improvement projects and teams, I chose a supportive role to experience what "being of service to others" honestly felt like without calling the shots. Adjusting to the role was difficult at times and led to feelings of frustration and impatience. Self-regulation of my emotions was a challenge particularly in moments when the team struggled in how to approach performing a task. I had to bite my tongue and hold back the urge to rush in and take charge, and remind myself to take a breath and allow the team space to think through current priorities and next steps at their own pace and in their own manner. What I realized was that what the team ended up with working things out in their own way was, more often than not, a better outcome than what I would have guided them to deliver.

However, this strategy didn’t always work for me. There were times when I would fall into old, familiar behavior patterns, asserting myself using declarative language in an exasperated, authoritative communication style, and offering suggestions and techniques (sometimes quite passionately) on tackling a problem, or pushing the team to reach higher standards of excellence in the execution of our work products. My behavior triggered at least one of the other members of the group who held an opposing view, believing a more straightforward approach overall would be more effective and stood their ground that “good was good enough”.

This dynamic created tension and stress in the group and provided a meaningful “teaching moment” to reinforce a group norm of naming issues right away and addressing them as a group in real time. Our willingness to lean into our mutual discomfort enabled the group to gain new insights, resolve the tension, and operate at a higher level of understanding. Such moments would then precipitate a self-care intervention celebrating success and renewing our shared commitment to each other and to the consulting process.

Other critical tasks performed on Day 1 included preparing for the initial contracting meeting with the client, addressing concerns about control and vulnerability, addressing personal needs that could get in the way of our work, and our attitudes about power, and even, the client itself.

Our primary goal for the first day was to be clean instruments and strive for authentic, caring relationships with each other and with the client. By the time we arrived at the client's offices and sat down for the initial meeting, the group was prepared and feeling confident that we had this and could navigate the discussion remaining fully present and at our best with full attention to our client.

Having invested so much time and effort in our first day tending to the needs of our group, Days 2 and 3 were just as productive, challenging, and meaningful as we continued to manage the process, the client relationship, and ourselves. The payoff from the hard work we did early on to address our personal and group dynamics, was evident in the quality of our work output and final presentation to the client at the end of Day 3. During the initial client meeting, both the CEO and CFO admitted cautious skepticism about our engagement. This was their first experience to work with the Pepperdine MSOD program. They expressed their willingness to "take a risk on us" and to invite us in. By the time we presented our final report on Day 3, however, the client sponsors were very clear to acknowledge that our group met all of their expectations "and then some". They expressed genuine gratitude and appreciation for what our group did for them. Our shared experience helped set the stage for future engagements between the client and Pepperdine.

Skills and techniques that I demonstrated during the consulting engagement included:

- I supported the team co-leads, by deferring to them and reinforcing their roles as co-leads by not interfering or usurping their authority in front of the client and when we worked as a team.

- I demonstrated effective self-regulation (most of the time) of my feelings of impatience and frustration associated with the adjustment to my role in the group.

- I contributed ideas, tools, and techniques in project planning, data collection and analysis.

- I took initiative to pull together the presentation early in the engagement to avoid last minute work and stress and to keep the team organized and focused on the final deliverable.

<u>Part B – Reflection on My Observations</u>

- Learning to function in a new role with a new team in a professional consulting engagement gave me valuable insights about my unconscious assumptions and biases. By being willing to lean into my discomfort, I experienced new ways of interacting with others and trusting the team and the process on a deeper level.
- Schein's principles can be applied to relationships with learning groups as well as to clients. In fact, one can apply these principles to every interaction with others in all situations—at work, at home, and with oneself. These principles are universal.
- I've gained new insight in my understanding of "clean instrument". It does not mean being unbiased, objective, and neutral. It means being aware of one's own biases and subjectivity, and making conscious decisions about how these biases and subjectivity can impact the helping relationship with the other. It is a keen awareness refined over time and the ability to distinguish between "what is mine, what is yours, and what is ours".
- I learned that in my effort to understand what is "yours", I diminished, judged, and denied what is "mine" for the sake of what is "ours". My new awareness seeks to restore balance, to love our uniqueness, and to stand on my own with courage and confidence to claim my authority. This is the first step towards establishing an authentic and caring relationship.

References

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