# Course Title: C.2.3 Consulting Skills

# Abstract:

This consulting skills course is focused on providing basic knowledge and information about the consultancy, role of the consultant in the small company, characteristics of the consultant that clients seek, reputation of the consultant as the most important way of consulting services promotion and open questions that could hinder successful consulting process. The course provides insight into basic skills, necessary to complete the consulting process. In order to avoid usual traps in the relationship consultant-client, students will be introduced with the consultancy pyramid that ensures satisfied clients and good reputation for the consultants. The course is designed having in mind special needs and problems of small and medium-sized companies. (Interactive exercises are in blue font, self-study in orange.)

**Recommendation for the lecturers:** Stroh, L. K. & Johnson, H. H. (2006). *The Basic Principles of Effective Consulting*. London, Lawrence Erlbaum Associates Publishers.

# Learning Objectives:

* Learning Objective 1: to understand tasks and role of the consultant in the company
* Learning Objective 2: to identify and recognize characteristics of the good consultants
* Learning Objective 3: to differentiate and explain different approaches to consulting
* Learning Objective 4: to understand and apply “the promise pyramid” methodology in its consulting processes
* Learning Objective 5: to define and differentiate different phases in the consulting processes
* Learning Objective 6: to understand and discuss about open questions and problems in the relationship SME owners-consultant
* Learning Objective 7: Students enhance their writing and research skills by preparing a consultancy report

# Assessment Method:

Short quiz, consultation hours with students, monitoring their field work

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| Session # | Session Content | Method(s) | Learning Objectives of Session | Material | Time (min) | Comments |
| 1 | **Introduction to consulting** | **105** | **Self-study: 3 hrs** |
| Introduction to consulting | Analysis and discussion about role of the consultant in a company | Understand tasks and role of the consultant in a company  | Whiteboard or flipchart, PPT slides 1-8Reading: Kurpius, D. & Robinson, S. E. (1978). An Overview of Consultation. *Personnel and Guidance Journal.* | 25 | Discuss the different definitions (two are offered in the PPT) of the consultant and the consultancy; students gain a common conclusion about the different clients and tasks that consultants can have. |
| Analysis of the consultant’s characteristics | Teamwork and discussion about the different roles of the consultant and characteristics of a good consultant Discuss in teams the different roles that the consultant had during the process and conclude what are characteristics of a good consultant. | Identify and recognise characteristics of good consultants | Whiteboard or flipchart, PPT slides 9-11Proposal: TV show “Nightmare Kitchen” by Gordon Ramsey (available at: <https://www.youtube.com/watch?v=m0ptRKX77vA>)  | 50 | Additional Reading:Czerniewska, F. (2004). What Sets Excellent Consulting Apart? *Consulting to Management, 15,3.*Additional reading (optional):Turner, A. N. (1982). Consulting is more than giving advice, *Harvard Business Review*, September-October.(Workload: 3 hrs) |
| Approaches to consulting | Analysis of different approaches to consulting and providing business advice  | Differentiate and explain different approaches to consulting | Reading:Schein, E. H. (1978). The Role of the Consultant Content Expert or Process Facilitator, *Personnel and Guidance Journal.* | 30 | Debate the different approaches – which approach is better and why?Students should be divided into two teams and each team should prepare arguments pro and con of approaches to consulting.  |
| 2 | **Formalization of the agreement** | **30** |  |
| Formalization of the agreement | Method for finding the problem in the company based on real needs of the client; important parts of the agreement; selection of the appropriate methods and tools in the consulting process | Understand and apply “the promise pyramid” methodology in their consulting processes | Whiteboard or flipchart, PPT slides 17-22Reading: Blake, R. R., Srygley Mouton, J. (1978). Toward a General Theory of Consultation, *Personnel and Giudance Journal.* | 30 | Explain the importance of the written agreement in the client-consultant relationship and finding the appropriate area to solve the problem. |
| 3 | **Consulting process – phases and decisions** | **70** | **Self-study: 1 hr** |
| Consulting process – phases and decisions | Identification of the phases in the consulting process  | Define and differentiate different phases in the consulting processes | Whiteboard or flipchart, PPT slides 24-34 | 30 | Analysis of steps – phases in the consultancy process emphasizing the most important points in every phaseReading:Kurpius, DW. J., Fuqua, D. R., Rozecki, T. (1993). The Consulting Process: A Multidimensional Approach, *Journal of Counseling & Development*, *71,* 601-606.(Workload 1 hr) |
| Client-consultant relationships | Traps in the consulting process and tips to avoid them | Understand and discuss open questions and problems in the relationship of SME owners-consultant | Round table discussion, PPT slides 34-50Reading:Nash, P. & Nader, F. P. (1990). Ten Guidelines for Effective Consulting, *Small Business Forum*, Fall.Additional reading:Stevenson, H. H. & Sahlman, W. A. (1988). How Small Companies Should Handle Advisers, *Harvard Business Review*, March-April. | 40 | Every consultant gets “tough questions” which can be crucial for furthering the relationship between client and consultant. Consultants should be able to address every challenge properly and clarify all the issues that client has (lecturers can prepare themselves for the round table with additional reading). |
| 4 | **Summary** |  |  |  | **20** |  |
| Wrap-up | Kahoot (or similar) quiz | Quick analysis and check-up of students’ understanding | Kahoot quiz and discussion of results | 20 | Questions:1. What do consultants provide to clients?
2. How many approaches to consulting are there?
3. Which consultant is always available to the client?
4. Which consultant brings fresh perspectives to the company?
5. The “Promise Pyramid” suggests that the best strategy is? (on-time and on-budget)
6. How many phases are there in the consulting process?
7. A powerful tool for defining the type of intervention is called? (Consulcube)
8. When the system is closed for change and there is disequilibrium between the forces for and against the change, should the contract be accepted or not?
9. When does the process of information gathering begin?
10. How many categories of intervention are there?
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| 5 | **Consultancy Role Play (See separate slides and instructions)** | **155** |  |
| Introduction |  |  | Slides 1-15 | 35 |  |
| Role play 1-3 (see separate instructions) |  |  | Slides 16-19 | 120 min | Time depends on how many rounds you play |
| 6 | **Consulting Report** | **90 min** | **Self-study: 2,5 hrs** |
| Consulting report:What is the purpose of a consulting report? | Open brainstorm | Students activate their knowledge on consulting reports. | PPT: Consulting Report, slides 50-52 | 5 |  |
| Consulting report: Report objective(s) and core question(s) Report structureResearch skills: sources, search strategies, references and citing) | Lecture (can be done as e-learning, based on previous knowledge of students | Students learn how to structure a consulting report by preparing a report outline. Students refresh their knowledge on research skills. | PPT: Consulting Report, slides 53-60Guideline consulting report (word file) | 15 | Required reading: Stroh, L. K. & Johnson, H. H. (2006). *The Basic Principles of Effective Consulting*. London, Lawrence Erlbaum Associates Publishers, pp. 102-123.(2hrs workload)Slides: 61-80 are self-explanatory and should be a review for students. Self-study time 30 min) |
| Research Questions & Report Objectives | Lecture | Students refresh their knowledge on research methods | PPT: 60-67 | 5 | This can be optional, depending on your students’ previous knowledge |
| Finding Information for theConsulting Report | Lecture | PPT 68-78 | 5 |
| Consulting report | Problem-based learning: pre-discussionFollow steps 1-5 of the guideline | Students activate their prior knowledge on report writing. | PPT 79-80Assignment: Consulting report Guideline problem-based learningWhiteboard or mind-map tool | 60 | (can be self-study exercise) |

# Comment and recommendation:

Consulting for small- and medium-sized companies is a course that is taught mostly through practice with real cases. At Josip Juraj Strossmayer University in Osijek the course is closely connected to the Law-Economic Clinic Osijek (a small business clinic that provides advice for start-ups on *pro bono* basis). Here, students work in teams with law students. Theory itself is not enough for providing quality consultancy service; therefore, students often are not able to deal with the open question and issues that appear during the consulting process. As a result, lecturers should provide consultation hours and regularly check students’ work with the SMEs, as well as enable them to discuss difficult situations with the lecturer (with the client, team members, etc.)

Answers on comments regarding teaching materials:

* For session 3, both readings are necessary to discuss on the topic.
* Slides 11-15 are not part of formalising the agreement, but setting objectives (please refer to the book Stroh, L. K. & Johnson, H. H. (2006). *The Basic Principles of Effective Consulting*. London, Lawrence Erlbaum Associates Publishers; as it was recommended prior to start lecturing.)
* The round table method is used for discussion from different points of views. One group of the students should take the perspective of the entrepreneurs and the other a consultant’s perspective. The discussion should be based on the recommended reading by Nash and Nader.
* The episode of Kitchen Nightmare is long, but it can be used in different parts of the lecture.
* The figure of the Consulcube is in low resolution, but this is the best one, I can provide.
* The literature is rather old, they are not scientific papers, but prepared for practitioners. Therefore, I chose to use them for this section.
* If you decide to use role-playing, then you need more time for teaching this consulting segment.