Understanding Yourself as an Instrument of Change

You Are an Instrument of Change – Every Part of You

Know Yourself to Know Your Clients

Consultants cannot work completely separate from their client’s organizations. The moment that a consultant begins to communicate with members of the client’s organization, that consultant begins to make a difference in the organization – that consultant is an “instrument of change.” You cannot be a successful change consultant if you do not understand yourself as the “tool” and how that tool is used. Guidelines in this section will help you to understand how you can be a successful instrument for change in your client’s organization. The guidelines are useful in all phases of the collaborative consulting cycle. The guidelines are applicable whether you are an external or internal consultant.

We often perceive what we believe and our perception is reality. Our beliefs are based on our perceptions and assumptions about ourselves and the world around us. The accuracy with which you understand your clients, their problems and their organizations, depends a great deal on how well you understand yourself. You must recognize your own biases about organizations, including how organizations should be led and managed. You need to recognize the “lens” through which you filter your perceptions about organizations. You also need to recognize how you prefer to collect and organize information, along with how you solve problems and make decisions about that information. Those features of yourself comprise your “mental model,” or your mental framework that drives your perceptions, assumptions, beliefs and, ultimately, what actions you take in the world.

Success Comes from Your Expertise – and from Who You Are

There are other advantages to having a clear understanding of yourself during consulting projects. The quality of the working relationship between you and your client often determines the quality of the project itself. Successful organizational change projects require the strong, ongoing ownership, commitment and participation of your clients. To get that from your clients, you must engage in a highly collaborative relationship with your clients. However, first your clients need to feel respected and trusted by you. They need to believe that your values and style are compatible with theirs. You can influence your client’s impressions by understanding how you “come across” to people in different situations. That kind of self-awareness is a great asset for you, particularly when working to understand and adapt to different cultures.

The guidelines throughout this overall section will help you to maintain a strong awareness of yourself and how clients might perceive you during your projects.

Use Guidelines in This Section to Understand Clients

Experts in organizational change assert that it is critical for consultants to understand the culture of their client’s organization. They assert that successful organizational change often means successful change in the culture, as well. One of the approaches that you might use to understand the nature of your clients, and others with whom you work in your client’s organization, is to tactfully ask them about their biases on organizations, their “lens” through which they view organizations, the style they prefer when working with others, and their preferred approach to problem solving.

See “How to Work in Multicultural Environments” on page 58 for guidelines to engage your client to help you understand their culture.

Understand Your Biases – We All Have Them

Your biases play a major role in how you perceive your client. Your perceptions are your reality, whether they are the reality for someone else or not. Differences in perception between you and your client can make the difference between a successful project and a complete disaster. So know your own biases! For example:

- Do you believe that leaders should “take charge” and lead from the front of the organization? If so, you might encounter frustration and resistance when working with clients who believe that leaders should lead from the middle.
- Do you believe that, if an organization struggles for a year or so, it should just be shut down? If so, you might find it difficult to accept a small organization working hard to sell a certain product, but just cannot get enough resources.
- Do you believe that clients should just “shut up and listen to you?” If so, you will probably find that clients will either seem glad that you are there (but then they will not do what you say) or they will kick you out of their offices.
- Do you believe that all businesses should maximize profits as soon as possible? If so, you will be frustrated when they place priorities on mission and passion, rather than on the “bottom line.”
- Do you believe that meetings should start and end on time? If so, you will certainly be frustrated with people from cultures that place far less emphasis on time.
- Do you believe that most problems would be solved if people just did what they were supposed to do? If so, you probably should not be a consultant.

Do You Talk About “Problems” or “Opportunities”?

This might seem like a trivial consideration. However, it can make a huge difference in how you and your clients perceive and participate in projects. Perhaps no philosophy or movement has made this point better than that of Appreciative Inquiry (AI). AI makes the point that, very often, we create problems and issues by considering and calling them as such.

Practitioners of AI might focus project activities especially on the organization’s opportunities and strengths (rather than on its threats and weaknesses). For example, they might help clients to clarify a positive vision for the future and then use those opportunities and strengths to reach that vision.

See “Another Perspective – Appreciative Inquiry (AI)” on page 27 for more information about AI.

The overall philosophy and associated attitudes that you choose to use in your consulting activities is up to you. Realize that that choice might also influence the quality of the relationships between you and your clients, depending on the philosophies and attitudes of your client.

Understand Your Preferred Consulting Style

You should understand your own style, including your overall goals in consultation and your basic assumptions about the consulting process. You must recognize your own philosophy of consulting, which ultimately determines your priorities and personal biases. If you are a leader acting as an internal change agent – an internal consultant – you should understand your leadership style.

You might consider describing your style and goals on one sheet of paper, which you refer to when describing yourself to your clients.

1. **Answer the following questions to discern your style**:

    a) What do you interpret as consulting?

    b) Do you like to ask questions a lot?

    c) Do you tend to challenge or confront others?

    d) Do you like a fast pace?

    e) Are you able to work comfortably in situations having a lot of ambiguity?

    f) Are you comfortable working closely with people whose styles are different than yours?

    g) Are you comfortable working as a facilitator of the interactions of others as opposed to being the center of attention?

2. **How much content will you provide and how much process?**
   Discuss with your clients how much you will provide as services regarding process (services concerned with how the group works) versus content (services concerned with what the group works on).

Understand Your Natural Responses to Feedback and Conflict

How Do You Respond to Feedback?

One of the best ways to influence your client during a project is to model the behavior that you want from your client. Usually, you want your client to be open to receiving feedback, whether the feedback is about their organization and its problems or even about the role that your client plays in the problems. Thus, to model that kind of behavior, you want to be open to feedback yourself. Often, that is easier said than done.

In this context, feedback is information about your actions or performance and is information that you act on. This is in contrast to information about others or either too vague or indirect to be useful to you.

Feedback from clients might make you feel uncomfortable. However, you can manage your actions in response to their feedback. Even if you feel threatened, frustrated or angry about the feedback, you can remind yourself that the feedback is not necessarily directed at you personally. Often, the feedback has more to do with your client's fear about the project than about you as a person.

You can also remind yourself that feedback from clients is a valuable gift to you. For example, it is not uncommon that consultants get so highly involved in their client's organizations and problems that they lose the professional objectivity required to be effective as consultants. Feedback from clients can be valuable forms of learning for consultants in these situations. Based on their learning, they realize they are too close to the problems in their client's organization and so they regain their perspective and effectiveness with their clients.

How Do You Respond to Conflict?

Experienced consultants realize that conflict is a natural outcome from interactions among different people and from changes in an organization. Conflict can have a variety of causes, for example, differences in perceptions among people, feelings of fear or disrespect, power conflicts, poor communication techniques or just plain fatigue during organizational change.

Conflict is not inherently bad. Problems come from how the conflict is addressed. Effective conflict management includes focusing on the issue at the heart of the conflict, rather than on the personalities of the people involved. It includes using effective means of communication, such as effective listening, supportive questioning and noticing non-verbal (non-spoken) communications.

You want your clients to advantageously recognize and manage their conflicts, rather than denying that those conflicts exist or engaging in ongoing destructive arguments with others. You can model successful conflict management by effectively responding to conflict within yourself.

It is not uncommon for clients and consultants to have strong emotions about change at various times during a project. It will be important for you to carefully respond to those emotions from your clients, recognizing the emotions and allowing your clients the freedom to express them. How you respond to conflict yourself is often how you to respond to the strong emotions of others.

PART I of this Field Guide includes numerous guidelines for addressing interpersonal conflict and conflict in groups, along with guidelines for many types of effective communication, and time and stress management.

What Is Your Emotional Intelligence?

There are different definitions for emotional intelligence (EI), but it is probably fair to generalize that it is the ability to recognize our emotions and then manage our responses to those emotions in a manner that enhances our health and relationships with others. There are some basic guidelines that might be useful in enhancing your own EI. Consider the following basic guidelines:

1. Notice how you are feeling and be able to name the emotion, for example, mad, glad, sad or bad. Be careful not to get confused between your thoughts and feelings. Notice the difference between and then use "I feel …" and "I think …" statements.

2. Notice how you judge those emotions, for example, you might believe that "it is scary and bad to feel angry."

3. Notice what situations typically evoke those emotions in you.

4. Notice the difference between your emotions and your outward responses to those emotions – what others would see you do and say. Ask yourself how you choose to feel about something and whether your behavior is aligned with that choice.

5. Realize that it is OK to have strong emotional reactions. It is what you do with those emotions that can be a problem for you and others.

6. Notice how long you retain those emotions. What changes them?

7. Notice what makes you happy and plan for those situations on a regular basis.

8. Notice how you make conclusions about other peoples' feelings. What are they doing or saying?

Understand Your Natural Approaches to Problem-Solving and Decision-Making

Different people have quite different preferences and approaches for solving problems and making decisions. Those differences can often cause conflict between people unless they each understand their own particular preferences.

The following preferences represent probably the most common preferences. It is important for you to note that any preference is not necessarily better than others. Certain preferences might work better in certain situations. The important point for you to realize is the diverse ways that people – including you – address problems and decisions. Always consider that diversity in your consulting projects.

Rational Versus Organic Approach to Problem Solving

Rational

A person with this preference often prefers using a comprehensive and logical approach similar to the following procedure. For example, the rational approach, described below, is often used when addressing large, complex matters in strategic planning.

1. Define the problem.

2. Examine all potential causes for the problem.

3. Identify all alternatives to resolve the problem.

4. Carefully select an alternative.

5. Develop an orderly implementation plan to implement that best alternative.

6. Carefully monitor implementation of the plan.

7. Verify if the problem has been resolved or not.

A major advantage of this approach is that it gives a strong sense of order in an otherwise chaotic situation and provides a common frame of reference from which people can communicate in the situation. A major disadvantage of this approach is that it can take a long time to finish. Some people might argue, too, that the world is much too chaotic for the rational approach to be useful.

Organic

Many believe that it can be quite illusory to believe that an organizational consultant is there to identify and solve problems for the client. Some people assert that the dynamics of organizations and people are not nearly so mechanistic as to be improved by solving one problem after another. Often, the quality of an organization or life comes from how one handles being "on the road" itself, rather than the "arriving at the destination." The quality comes from the ongoing process of trying, rather than from having fixed a lot of problems. For many people it is an approach to organizational consulting. The following quote is often used when explaining the organic (or holistic) approach to problem solving.

> *"All the greatest and most important problems in life are fundamentally insoluble … They can never be solved, but only outgrown. This "outgrowing" proves on further investigation to require a new level of consciousness. Some higher or wider interest appeared on the horizon and through this broadening of outlook, the insoluble lost its urgency. It was not solved logically in its own terms, but faded when confronted with a new and stronger life urge."*
>
> From Jung, Carl, *Psychological Types (*Pantheon Books, 1923)

See "Another Perspective – Organic, Holistic OD" on page 26 to learn about the holistic and organic approach to organizational development.

A major advantage of the organic approach is that it is highly adaptable to understanding and explaining the chaotic changes that occur in projects and everyday life. It also suits the nature of people who shun linear and mechanistic approaches to projects. The major disadvantage is that the approach often provides no clear frame of reference around which people can communicate, feel comfortable and measure progress toward solutions to problems.

Intuitive Versus Sensing Approaches to Gathering Information

There are a variety of assessment instruments that are often referenced when helping people understand their own unique styles when solving problems and making decisions, for example, the Myers-Briggs Type Indicator® instrument. One of the dimensions of the Myers-Briggs is "Intuitive versus Sensing," which considers how a person gathers information. (Myers-Briggs is a registered trademark of Consulting Psychologists Press, Inc.),

Intuitive

A highly intuitive person often gathers information instinctively. They thrive on ideas and possibilities. They might seem oblivious to what is going on around them, yet they often effectively solve problems and make decisions based on surprisingly valid information. Many times, they might not even know how they did it. Some experts on leadership and management assert that highly experienced people often have developed intuition that enables them to make quick, effective decisions. A major advantage of this approach is that it can save a great deal of time. A major challenge can be how to explain their choices to others.

Sensing

These people thrive on facts and information. They are detail-oriented and accuracy is important to them. They are aware of their physical surroundings, of who is saying what. They solve problems and make decisions by considering the “data” around them. One of the major advantages of a sensing person is that their actions are often based on valid information. Thus, they are able to explain their reasoning and their actions to others. A major challenge is the time and care required for them to solve problems and make decisions.

Thinking Versus Feeling Approaches to Process Information

Another major dimension of the Myers-Briggs Indicator® instrument is “Thinking versus Feelings,” which considers how a person makes decisions about information.

Thinking

A thinking person often uses a highly objective, sometimes rational approach to organizing, analyzing and making decisions about information. At their extreme, they might shun consideration of emotions. The thinking person probably prefers the rational approach to problem solving as described above in this subsection. The advantage of this approach is that it often generates valid problem solving and decision-making. A major challenge can be that it might require an extensive amount of time to come to action.

Feeling

The feeling approach is used most often by individuals who are quite sensitive to their values in processing information. When people focus on their values, emotions often come into play. A major advantage of this approach is that it can help to ensure that people are happy and fulfilled in the situation – that their values have been considered during the process and are reflected in the outcome. A major challenge is that there are a variety of short-term factors that can influence a person’s emotions other than the current major problem or decision, for example, their not having had enough sleep or having eaten right.

Understand Your Preferred “Lens” Through Which You View Organizations

One of the most frequent reasons that organizational consultants argue about the best methods for organizational change is because consultants often have different perspectives, or lens, through which they view organizations. The impact of these differences is often underestimated. For example, you can have two different consultants interact with an organization and they might later provide different descriptions of the same organization. Therefore, it is critical that consultants understand their own perspective and be sensitive to the organizational perspectives of others.

One of the most useful resources to explain these perspectives is *Reframing Organizations* (Bolman and Deal, Jossey-Bass, 1991). The authors depict four quite different and major organizational perspectives among researchers, writers, educators, consultants and members of organizations.

Table I:3 – Various “Lens” Through Which We View Organizations

Lens	Examples of What is Noticed or Talked About from That Lens
Structural	Goals, objectives, roles, responsibilities, performance, policies and procedures, efficiency, hierarchy and coordination and control
Human Resource	Participation, feelings, fulfillment, communication, needs of people, relationships, motivation, enrichment and commitment
Political	Power, conflict, competition, authority, experts, coalitions, allocation of resources, bargaining and decision making
Symbolic	Rituals, culture, values, stories, different perspectives, language, expressions, myths, commitment and metaphors

Note that these are horizontal lens regarding what different people notice across the activities in organizations. There are also many vertical lens through which we view intra-personal dynamics, for example, the many perspectives put forth in the increasing amount of books on personal development.

It is important for you to realize that no lens, or perspective, is better than the others. Experienced consultants have learned that the more perspectives that they can get from their clients about an issue in their organization, often the more accurate and useful are the plans to address that issue. Thus, the more lens through which you can view organizations, the more useful you will be to yourself and your clients.

Understand Your Preferred Focus on Organizations

People naturally focus on different areas of the same organization during the same project. That difference can cause conflict and confusion, especially during the initial phases of the project. Therefore, it is important for you to recognize your own preferred scope during projects and, if possible, recognize the scope preferred by your clients. The following are probably some of the most common areas of focus viewed by people during projects.

Focus on “20/80” (Pragmatic Approach)

This perspective tends to generate activities focused on quick, up-front, practical action plans that take 20% of your client’s time and energy, but might address 80% of the problems in your client’s organization. The disadvantage of the 20/80 approach is that ongoing, renewed action plans are sometimes necessary to generate long-term results.

Focus on Functions (Silo Approach)

This perspective focuses primarily on the scope of the “presenting” priority – the priority that is first noticed and reported to you by your client. It might be a major problem in the organization that your client wants to solve, or it could be an exciting goal that your client wants you to help them to achieve. Note that the presenting priority often is a symptom of deeper, more entrenched problems. For example, many leaders complain about lack of money, yet their real problem is ineffective strategic and business planning. A major advantage of this silo approach can be that it often gives quick comfort to your client who wants a “quick fix” and strongly believes where the problem lies in the organization. A major disadvantage is that, because organizations are complex and often rapidly changing, problems often require a larger focus than the particular function first reported as having the problem

Focus on Holistic, Systems Approach

This perspective places strong focus on the overall system (for example, on the entire organization, product or service) and especially on the relationships among subsystems within the system (for example, on the coordination among processes, such as strategic planning, marketing and sales). This is an example of whole systems thinking. A major advantage of this approach is that it is more likely to effectively address complex challenges in organizations. A major challenge is in mastering systems thinking and use of systems tools.

How to Inventory Your Skills as an Organizational Development Consultant

There can be a wide range of services and associated skills that are applicable to organizational change projects. Without a clear understanding of one’s strong interests and skills as a consultant, you are more likely to lose motivation and succumb to burnout. Also, you are much more likely to hurt your client’s organization and your own professional career. In addition, you will not know when and how to adapt your approach to consulting in various situations. You will not know when to ask for help or even when to leave a project, if necessary. One of the most important assets of any consultant is their reputation, their credibility. Credibility often comes from doing what you say you are going to do and doing it well, so credibility often comes from knowing what skills you are good at.

Therefore, it is critical for you to have a clear sense about what services you are excited about and interested in, and what services you dislike and often want little or nothing to do with. That sense can come from conducting an inventory of your skills and expertise. They can be organized into a variety of categories, but the following three might be most clear and meaningful to you:

1. **Technical**
   Includes mastery of content-specific information and practices, for example, with phases of consulting or with specific functions and processes in organizations.

2. **Interpersonal**
   Includes mastery of skills to understand and manage oneself and others and to maintain high-quality relationships with others.

3. **Process**
   Includes mastery of skills to work with others to effectively and efficiently develop and implement project plans.

Consider the following guidelines when attempting to identify what consulting services you want to provide and what skills you have to provide those services.

General Guidelines for a Self-Inventory

1. **Use the 20/80 rule.**
   Attempt to identify the 20% of interests and skills that generate 80% of the most fulfilling services that you could provide as a consultant.

2. **Reference a list of competencies, if possible, regarding your general interest.**
   Many professions have established a list of competencies (knowledge, skills and attitudes and the ability to apply them for change) associated with high-performers in that field.

See “Competencies for OD Consultants” on page 53 for more information.

3. **Consider major types of consultants.**
   Many times, it is easier for us to relate broad roles rather specific service areas, such as Boards, marketing or finance.

See “Major Types of Consultants” on page 5 for descriptions of standard roles.

4. **Get feedback from others.**
   Our opinions of what we like and dislike can often change, depending on our moods, or even if we have not been sleeping well lately. Thus, we often get a much more accurate and valid impression of our preferences if we ask family, friends or peers to give us their opinions about us.

5. **Reference past experiences more than fantasies and daydreams.**
   Consider past experiences when identifying your preferences. Our history is often a more reliable indicator of our preferences than, for example, our fantasies or daydreams about the future.

6. **Start with your feelings first.**
   What services are you passionate about? What gives you “goose bumps,” or thrills? In contrast, what services do you dislike?

7. **Next, consider your interests.**
   What have you been reading or talking a lot about lately regarding services to organizations? What conversations do you notice the most?

8. **Then, consider trends in the particular service.**
   For example, you might prefer to provide services in the areas of face-to-face marketing. However, a great deal of marketing is now being done over the Internet. That might change your preference.

9. **Assess your skills in your preferred area of service.**
   A powerful approach to assessing your skills is to work with a mentor in that area. For example, you might find an organization in which you could volunteer and work with a more experienced consultant to get an impression of your skill level.

See "Professional Organizations" on page 452 in Appendix B to contact any of the professional organizations where you might find, or get referrals to, opportunities to volunteer or find a mentor.

Competencies for OD Consultants

One powerful approach for organizational change consultants to inventory their relevant skills is to review a list of recommended competencies. The focus of the field of Organization Development is on the values, theories and models, and tools and techniques to successfully accomplish organizational change. Therefore, it might be useful for you to examine a list of competencies for high-performing OD consultants.

One of the more comprehensive studies of OD competencies was led by Roland Sullivan for the Organization Development Institute. That effort resulted in a free report, *The Knowledge and Skills Necessary for Competence in OD*, located on the Web at http://members.aol.com/ODInst/skills.htm. Note that some OD consultants might consider that list of skills as an ideal.

Knowledge Areas for Organizational Development Consultants

In addition to the competencies suggested for consultants in the field of Organization Development, there are certain major functions about which you should have knowledge. The degree of knowledge required depends on the nature of the particular services that you offer as a consultant. All organizational consultants should have at least basic, general knowledge about some of the major functions, including:

1. **Board of Directors**
   Board members should be aware of, and sometimes approve and oversee, consulting projects that affect a significant portion of a corporation (a corporation is legally required to have a Board of Directors). You should understand at least the roles and responsibilities of a governing Board, including how they compare to the roles and responsibilities of employees.

2. **Strategic planning**
   Project plans for organization-wide projects are often most effective if integrated into an overall strategic planning process. You should have a fairly good working knowledge of the typical strategic planning process, including its major phases and activities.

3. **Marketing**
   Marketing is managing the relationship between the business and its customers to ensure that both parties want to work with each other and receive equitable value from the relationship. Marketing includes research, identifying target markets, products and packaging, pricing, unique value propositions, and advertising and promotions.

4. **Product development**
   Consulting projects often are meant, ultimately, to improve products and services. You should have at least a basic understanding of the process to design, develop and provide a product or service.

5. **Staffing (Human Resources)**
   It is likely that employees will be highly involved in your projects. You should have at least a basic understanding of how staffing roles are typically analyzed, how employees are trained and organized, and how employees are supervised.

6. **Financial management**
   Projects will likely incur substantial cost to your client’s organization and various types of financial transactions. You should be aware that financial management typically includes budgeting, projecting, recording transactions, generating financial statements and analyzing those statements on a regular basis.

7. **Evaluation**
   Evaluation of your projects might be more efficient in they are integrated with evaluation activities that are already underway. Businesses might conduct evaluations of employees, products, the Chief Executive Officer and the Board.

You might require some degree of knowledge in other major functions in business or organizations, such as market research, advertising and promotions or facilities management.

PART II, starting on page 111, is all about organizations, including major functions in organizations.

To learn even more about organizations and each of the major functions, see Recommended Readings on page 483.

How to Articulate Your Professional Mission and Values

Your professional mission and values serve as your “compass” in life and work. This is true whether you are an external or internal consultant. They guide how you make decisions and solve problems, especially during complex and challenging activities. For many of us, our mission and values are implicit – we have not taken the time to clarify them explicitly or to write them down. Without explicitly proclaiming the mission and values from which we want to operate as professional consultants, we are prone to getting ourselves into situations – and operating in those situations – in a manner that does not match our nature and needs. Your professional mission and values can be communicated to clients to help them to understand and trust you, which is critical in collaborative consulting. Therefore, it is important for professional consultants to consider articulating their own mission and value, ideally in mission statements and values statements.

Developing Your Professional Mission Statement

Your professional mission statement describes at least the overall purpose of your consulting activities. There are various perspectives on mission statements. Some people believe the statements should describe an overall purpose. Some people believe the mission should also include a description of a vision, or future state. Some people believe the mission should also include a description of overall values. Mission statements can be just a few sentences long.

There are also various perspectives on how to develop a mission statement. The suggestions below are associated with one of the ways to develop your own professional mission statement to describe the purpose of your consulting activities.

The process of producing your own professional mission statement is as important as the mission statement itself. Therefore, it is important for you to carefully think about your own mission before you reference any mission statements produced by others.

When you write your professional mission statement, it should:

1. Succinctly describe the purpose of your consulting activities.

2. Succinctly describe the overall type(s) of clients you serve in your work.

3. Mention the particular results (new knowledge, skills and/or conditions) that you work to help your clients achieve.

4. Convey a strong public image.

5. Mention any particular strengths and expertise that you have.

6. Be clearly understandable by you and your clients.

Developing Your Professional Values Statement

Your professional values statement describes the most important priorities in the nature of how you want to operate as a consultant. Some people might prefer to do a principles statement. Principles are descriptions of values in action and often begin with the phrase, “I will ...” or “I believe …” Similar to the mission statement, the process of producing the values statement is as important as the values statement itself. The following guidelines will be helpful to you as you develop your own professional values statement.

1. **When identifying values, think about behaviors produced by those values.**
   Many of us struggle to directly identify desired values. We can get bogged down in words that seem too general, idealized – even romanticized – to be useful. Often, it helps first to identify desired behaviors and then the values that produce those behaviors.

2. **Consider any relevant laws and regulations that pertain to your consulting.**
   Identify behaviors or values that will help you operate in a manner so as to avoid breaking these laws and to follow the necessary regulations.

3. **Consider suggested overall goals and assumptions for effective consultants.**
   Block (2000) suggests certain overall goals and working assumptions for any consultant.

See “Most Important Goals for Consultants” on page 7 and “Working Assumptions for Consultants” on page 7 to read Block’s suggestions.

4. **Consider suggested principles for effective consulting.**
   Consider behaviors and values that are in accordance with the most important principles for consulting for you.

See "Principles for Effective Consulting" on page 29 for a listing of one suggested set of principles.

5. **Consider your own lens, biases, style, response to feedback and conflict.**
   You might identify behaviors and values that will help you to counter any potential misperceptions or obstacles that you might develop because of your own particular nature and needs.

6. **Consider any current, major issues in your work.**
   Identify the behaviors needed to resolve these issues. Identify which values would generate those preferred behaviors. There may be values included that some people would not deem as moral or ethical values, for example, team-building and promptness, but for many, these practical values may add more relevance and utility to a values statement.

7. **Consider any ethical values that might be prized by your clients.**
   For example, consider expectations of their customers, suppliers, investors and members of the local community. Before you identify these "public relations" values, be careful that you do not select values that you really cannot adhere to in your work.

8. **From the above steps, select the top five to ten values.**
   You cannot be all things to all people, including to yourself. Even if you do include all the values on your statement, it is still important for you to carefully think about which values are most important to you.

9. **Associate with each value, two example behaviors which reflect each value.**
   Examples of behaviors for each value make the values much more explicit and understood to you and to others.

10. **Update the statement at least once a year.**
    The most important aspect of the statement is developing it, not the statement itself. Continued dialogue and reflection around your values cultivates awareness and sensitivity to act in accordance to your values. Therefore, revisit your statement at least once – preferably two or three times – a year.

See "Principles for Ethical Consulting" on page 30 for information about ethical consulting and for references to examples of codes of ethics, which are also a form of values statement.

Summarize Your Learning About Yourself as a Change Agent

Answers to the following questions will help you practice explaining key terms and activities that you might need to explain to your clients. Answers might also help you to develop a clearer understanding of yourself as an instrument of change. The questions are about the information provided throughout PART I.

Table I:4 – Exercise: Summarize Learning About Yourself

1. How do you define "consultant"? "Organizational development consultant"?
2. What kind of consultant are you now?
3. How do you define collaborative consulting?
4. What are the advantages of collaborative consulting?
5. What are the seven phases of organizational consulting in this Field Guide?
6. If you consider yourself to be an OD professional, how do you define "OD"?
7. What are your overall goals and working assumptions as a consultant?
8. Describe your biases (everyone has them) about leading and managing.
9. Do you prefer to see priorities as "problems" or "opportunities"?
10. Describe your consulting style. Consider your preferred use of humor, pace, questions versus comments, and content versus process.
11. How do you respond to conflict? To feedback about yourself?
12. What are your preferences for problem solving and decision-making? Consider rational versus organic, intuitive versus sensing, and thinking versus feeling.
13. What is your "lens" on organizations? Consider structural, human resource, political and symbolic.
14. What is your current, natural focus on organizations? Consider 20/80, functional and holistic/systems.
15. What are your current areas of expertise in consulting?
16. What are your professional mission and most important values for operating as a consultant?