

# What to Look for in a Consultant

Whenever you invite a consultant to help you and your team you are looking for 3 key advantages.

1. **OBJECTIVITY** – A fresh set of experienced eyes ... A fresh objective perspective
2. **WISDOM** – The kind that comes from asking profound questions, based on years of experience
3. **NETWORK** – New people and tools that can expand your perspective and options

There are also at least 3 levels of consultants to consider:

1. **ORGANIZATIONAL DEVELOPMENT** – Helping you develop your entire organization
2. **PERSONAL DEVELOPMENT** – Teaching refined leadership skills to your executive team
3. **TECHNICAL DEVELOPMENT** – Helping you in some specific division, or type of project

## Traits of Successful / Not Successful Consultants

Recently a friend, Kevin Wilson, asked me to reflect on the question, “What are the traits of a successful consultant – the kind you would recommend? What are the traits of a not successful consultant – the kind you would suggest a person avoid?” After 30+ years as a personal and organizational development consultant the following is my view of what makes a successful consultant – the kind you would want to allow access to your inner most thoughts and your core team. I have also included my perspective on the consultant you want to avoid.

Your consultant may be of either gender.

Some of our best consultants are men.

Some of our best consultants are women.

To facilitate the flow of thought and language I am using the masculine form of pronoun.

Hoping you have a very successful experience with the consultant of your choice.

Here to help you win!

Bobb Biehl

# WHAT TO LOOK FOR IN A CONSULTANT

## TABLE OF CONTENTS

### ATTITUDE

*Your Consultant Should ...*

- BE HUMBLE**
- BE FLEXIBLE**
- BE TEACHABLE**
- BE A “POWERFUL SERVANT”**
- BE A MENTOR**

### CHARACTER / VALUES

*Your Consultant Should ...*

- BE A BELIEVER**
- BE A PERSON OF CHARACTER**
- BE FOCUSED BY A “LIFE DREAM”**

### EXPERIENCE

*Your Consultant Should Have ...*

- A VISIBLE SUCCESS**
- A BROAD EXPERTISE**
- AN EXTENSIVE NETWORK**

### PERSONALITY

*Your Consultant’s Personality Should ...*

- BE CREDIBLE**
- BE CONFIDENT**
- BE RELATIONAL**
- BE EMPATHETIC**

### PROFILE

*Your Consultant Should ...*

- BE A DESIGNER / DEVELOPER, A DEVELOPER, OR A DEVELOPER STABILIZER**
- BE PRIMARILY DRIVEN BY SIGNIFICANCE OR ADMIRATION**
- BE WISE**
- BE RESULTS ORIENTED**
- BE REALISTICALLY OPTIMISTIC**

### POLICIES

*Your Consultant Should ...*

- ALWAYS ... DO WHAT IS BEST FOR THE CLIENT**
- ALWAYS ... LET THE CLIENT MAKE THE FINAL DECISIONS**
- NEVER ... BETRAY A CLIENT’S CONFIDENCE**

### STRENGTHS

*Your Consultant Should have the ability ...*

- TO ASK PROFOUND QUESTIONS ... WISELY**
- TO WORK WITH SENIOR EXECUTIVES ... CONFIDENTLY**
- TO WORK AT A PROCESS / PRINCIPLE LEVEL ... CONSISTENTLY**
- TO COMMUNICATE ... EFFECTIVELY**
- TO FOCUS ON THE CLIENT FOR HOURS AT A TIME ... COMFORTABLY**
- TO WORK LONG HOURS / TRAVEL ... FLEXIBLY**
- TO USE PROFOUNDLY SIMPLE TOOLS ... APPROPRIATELY**

## **ATTITUDE**

*Your Consultant Should ...*

### **BE HUMBLE**

Your consultant should be one who is genuinely centered on you the client. You are looking for a good listener - a person who can listen to your heart, concerns, dreams ... and help you separate out / concentrate on the significant pieces. You want a gentle serving attitude ... not a “bull dozer”.

Avoid an egocentric person. Stay away from a user – who sees himself as your “Savior”. He can give a quick illustration from his own life ... but, you do not want one to spend a high percent of your paid consulting day telling his own story. You do not want a person who focuses on his pat answers rather than your questions.

### **BE FLEXIBLE**

Your consultant should be able to flex on a moment’s notice to go with your newly adjusted agenda for the day. In some cases he should be able to see and flex with the wisdom in your answers / approach / solutions ... even when they differ from his preconceived answers, if yours are in fact better solutions. As the old preachers used to say, “You need to be ready to Preach, Pray, Die ...at any moment”. A Consultant never knows what’s coming – he needs to be confident he will land on his feet, and always remain flexible!

Avoid a person who insists on his own approach – one not flexible to see when to go with your better answers. You do not want a person who will get rigidly stuck – like a “broken record” – on his perspective, answers, and solutions ... even when you are uncomfortable with the direction he is suggesting.

### **BE TEACHABLE**

Your consultant must have deep experience. At the same time he should remain teachable in his understanding of your uniqueness, approaches and strengths. You want a person who will eagerly listen and learn of your organization’s various strengths and focus on helping you maximize them. You want a person who continues to grow into his potential at the same time he is helping you grow into yours.

Avoid the person whose only comfort zone is teaching ... never learning. Avoid a stagnate person who is teaching exactly what he taught 25 years ago in exactly the same way with an arrogant “know it all” attitude.

## **BE A “POWERFUL SERVANT”**

Your consultant should stay consistently focused on bringing his considerable strength to bear on helping accomplish your agenda. 100% of his focus should be on, “What do you want or need? What can I do to help you win?” This is what I call a “Powerful Servant’s” attitude.

Avoid the consultant who rarely asks, “What do you want or need?” You want a person who will stay on your agenda! Beware also of the person who brags excessively about his role in other clients’ successes – he is likely missing a “servant’s heart”.

## **BE A MENTOR**

Your consultant’s heart attitude should be “My friend I’m here to help you win!” You are looking for a person who will help in any way possible to help you get where you want to go and a person who will experience genuine joy when you are winning.

Avoid the person who feels like a “hired gun” who is consulting with you only for the money ... not a friend who is eager to help you get where you and your team are going! Avoid the person who needs so much credit that he can not share whole-heartedly in your joy. Avoid a person who’s attitude is “Here to tell you what to do!”

## **CHARACTER / VALUES**

*Your Consultant Should ...*

## **BE A BELIEVER**

Assuming you are a believer your consultant should be a mature believer who is focused on serving and obeying God. Psalm 1 is clear, “Blessed is the man who walketh not in the council of the ungodly...” Obviously just because a person is a believer does not automatically mean he would make a wise or Godly consultant. But being a believer is “Square One”.

Avoid the person who will give you ungodly council which violates scriptural truths.

## **BE A PERSON OF CHARACTER**

Your consultant should have no unresolved skeletons in his closet. The only way he can help spot any crookedness in your thinking / values is if he has straight thinking in his own life. Your consultant’s honesty is a non-negotiable. He must be totally trustworthy. You should only have a consultant you would be comfortable trusting alone with your spouse and your precious children.

Avoid a person lacking character, with a closet full of unresolved skeletons, a dishonest person, or a person whose thinking and values are inconsistent with Biblical teaching.

## **BE FOCUSED BY A “LIFE DREAM”**

Ideally, your consultant will have a life long dream that is in alignment with helping you get where you are going. Ideally, his “Life Dream” will include strengthening Christian leaders like yourself.

Avoid the consultant with no long-term philosophical or spiritual context for his life. Avoid the day-to-day person who is the extreme pragmatist in his thinking.

## **EXPERIENCE**

*Your Consultant Should Have ...*

### **A VISIBLE SUCCESS**

Your consultant should have a visible success in his own life. As he teaches you various processes and principles he should be able to share briefly some examples of how he has used them successfully in his own life.

Avoid the person who has never experienced success in some major area of his own life. He is teaching you theory without practice. If he hasn't used his own processes and principles to become successful why should you pay for his advice?

### **A BROAD EXPERTISE**

You are looking for depth. Your consultant should be able to teach you a wide variety of processes, principles and tools. He should be able to consistently give you valuable perspective on a wide range of topics.

A consultant may give his best material on day one and have very little helpful information to give you the second day. Avoid any consultant who has no satisfied clients you can call. Avoid any consultant who charges high fees / with little consulting experience. Avoid any consultant who may leave you wondering if you got your money's worth.

### **AN EXTENSIVE NETWORK**

Ideally your consultant should have an extensive network of capable friends. If you get blocked at some point because he doesn't have experience in a specific area – the more people he has access to, the easier it is for him to bring in the appropriate outside resource. This is not a sign of weakness but of strength.

Avoid seeking the council of a person who is the “new kid on the block” limited in the advice he gives you to his own world of experience. Be cautious of the person who will never suggest bringing in an expert in some area which goes beyond his own expertise.

## **PERSONALITY**

### *Your Consultant's Personality Should ...*

#### **BE CREDIBLE**

Your consultant should be one you sense you can trust – *to help you get where you are going* — in the first hour (or two) you are together. Your confidence will grow deeper and deeper over time but typically you can trust your first impressions of who you will allow into your private world ... and, to help you create the world of your dreams.

Avoid a person if you are still uncertain of his advice – *to help you get where you are going* – after one or two hours. Some people you will never really trust to give you wise council. Avoid ... any consultant who makes you genuinely uncomfortable in any way!

#### **BE CONFIDENT**

Your consultant should be one who has a confident inner core. This is the deep “life confidence” which comes from being loved without conditions as a child. He should be genuinely at ease in nearly any setting, rarely threatened by any person or situation. He should be socially comfortable and appropriate at any level you invite him to as one of your guests.

Often the person with just a “mask of confidence” is actually masking insecurity. You want to avoid a consultant who is fundamentally insecure and nervous. This person’s lack of personal security will make him very uncomfortable for you to be with for hours at a time.

#### **BE RELATIONAL**

Your consultant should be one who relates equally well to men and women. A person who can relate heart to heart – when appropriate – as well as simply be socially gracious. You need a person who will read your emotions accurately, and be comfortable with very emotional situations which come up occasionally in the consulting context.

Avoid the consultant who relates well to men but not women.

Avoid the consultant who relates well to women but not men.

Beware of a consultant who socializes but never truly relates. Often this person does not read emotions accurately, and is uncomfortable with very emotional situations.

## **BE EMPATHETIC**

Your consultant should communicate with empathy. He should keep asking, “If I were you ... if this were my organization ... if I were in this exact situation ... considering all of my processes / principles / experience ... what would I do?” At the same time he must always realize he is not you. He must remain objective about you and your organization. He may be able to do things easily you would find nearly impossible. On the other hand, you may be able to do other things easily he would find nearly impossible.

Avoid the person who spends all of his time talking “AT YOU” but not “WITH YOU”. Avoid the person who can never listen to the intents and dreams in your heart. He may be so preoccupied getting ready to tell you what he thinks you need to hear that he can not listen sensitively to what you are actually saying.

## **PROFILE**

*Your Consultant Should ...*

### **BE A DESIGNER / DEVELOPER, A DEVELOPER, OR A DEVELOPER STABILIZER**

*(These profiles are taken from “Team Profile”, available from Aylen Publishing. 800-443-1976)*

1. A DESIGNER / DEVELOPER ... Wise in developing fresh / original concepts, ideas, approaches, or
2. A DEVELOPER ... Courageous in helping expand / build / develop our organization, or
3. A DEVELOPER STABILIZER ... Faithful in refining your existing organization, making it better, or improving what is already in place.

#### **YOUR CONSULTANT SHOULD NOT BE**

1. A DESIGNER ... Brilliant, but a Designer will be bored quickly with the many practical aspects of your situation, or
2. A STABILIZER ... Loyal, but it is very difficult for a Stabilizer to remain flexible ... especially with new projects

### **BE PRIMARILY DRIVEN BY SIGNIFICANCE OR ADMIRATION**

*(Taken from the book Why You Do What You Do, available from Aylen Publishing. 800-443-1976)*

1. SIGNIFICANCE – He wants to make a genuine difference in your life, and / or
2. ADMIRATION – He will work hard to get your admiration

#### **YOUR CONSULTANT SHOULD NOT BE PRIMARILY DRIVEN BY:**

- \* BEING LOVED – He will have a lack of core confidence
- \* GETTING RECOGNITION – He will find it hard to stay 100% on your agenda
- \* BEING APPRECIATED – He will likely be intimidated by your strength
- \* BEING SECURE – He will focus on his own agenda to gain security
- \* BEING RESPECTED – He will tend to be intimidated by and fearful of your strength
- \* BEING ACCEPTED – He may not be able to take a stand which disagrees with your strong – but dangerous – direction ... fearing your rejection.

## **BE WISE**

Your consultant should be known by his friends as a practical and wise person. He should listen to you carefully and objectively – postponing judgement until all of the relevant variables are on the table. He should find it natural to keep your “big picture” in his mind. He should think in terms of eliminating causes rather than just dealing with symptoms.

Avoid a consultant who will not listen carefully, “jump to conclusions”, give quick “pat answers”, or come to solutions which do not seem wise to you at a practical level.

## **BE RESULTS ORIENTED**

Your consultant should be more interested in measurable results than the appearance of success. He should be good at bench marking and measuring actual progress.

Avoid the consultant who never suggests the measurement of progress. Avoid the “things are going great” hype with no measurable difference being tracked.

## **BE REALISTICALLY OPTIMISTIC**

Your consultant should find it easy to stay realistically optimistic. Just as easily and naturally he should be verbally affirming, supportive, and encouraging of you, the client.

Avoid a consultant who by nature is pessimistic and needs your constant affirmation, support, and encouragement.

## **POLICIES**

*Your Consultant Should ...*

### **ALWAYS ... DO WHAT IS BEST FOR THE CLIENT**

Your consultant should be one who always drives toward a “Triple Win”. You win, he wins, and your team wins as well. He never tries to over sell you. He practices 100% honesty and integrity even if it costs him in a major way! He should quickly bring in other consultants with needed experience if he is “insufficiently experienced” and, it would be best for you.

Avoid the consultant who does just what is best for himself ... one who drives to a “I Win”, one who will even shade the truth ... if the whole truth would cost him too much!

## **ALWAYS ... LET THE CLIENT MAKE THE FINAL DECISIONS**

Your consultant should be one who will brainstorm, suggest, recommend, or urge, but will always leave the final decision to you.

Avoid the consultant who always wants to – in an offensively authoritative manner – tell you what to do!

## **NEVER ... BETRAY A CLIENT'S CONFIDENCE**

Your consultant should be one who would never share your confidential information unless you have given him permission to do so, or your information has already been published. Avoid the consultant who discloses confidential information about other clients where he has not been given permission. What he discloses to you about others is the type of information he will likely disclose to others about you.

## **STRENGTHS**

*Your Consultant Should have the ability ...*

## **TO ASK PROFOUND QUESTIONS ... WISELY**

Your consultant should be one who wisely asks profound questions... which help quickly focus the conversation on your boulders ... and, then stays focused on your boulders all day long.

*If you ask profound questions – you get profound answers.*

*If you ask shallow questions – you get shallow answers.*

*If you ask no questions – you get no answers at all!*

Avoid the consultant who asks shallow questions ... or, no questions at all.

## **TO WORK WITH SENIOR EXECUTIVES ... CONFIDENTLY**

Your consultant should be one who is very confident in working with senior executives. This may be a person who has been an executive director, head coach, president, senior pastor, or obviously has the ability to lead at that level. Either way, they are comfortable mentoring you at the senior executive level.

Avoid the consultant who is not comfortable with the idea of being your executive mentor. You obviously do not want a person consulting with you who is intimidated, frightened, or frozen in your presence. Avoid choosing a consultant who is experienced at a level below what you need – a consultant may have vast experience in a specific department / division but will flounder if you ask for his wisdom, advice, or experience at a senior executive level.

## **TO WORK AT A PROCESS / PRINCIPLE LEVEL ... *CONSISTENTLY***

Your consultant should be one who works consistently at a process / principle level. This is how a good consultant can consult with banks, churches, professional musicians, manufacturing companies, insurance companies, non profit organizations, and real estate firms even though he is not a specialist in any of these fields. He understands the essential processes and principles of focusing and developing any organization.

Avoid a consultant who understands one field or discipline extremely well but doesn't know how to generalize the processes and principles of his field to any other.

## **TO COMMUNICATE ... *EFFECTIVELY***

Your consultant should be one who speaks clearly in simple words anyone can understand. You should be able to call on your consultant at a moment's notice to speak – very clearly and practically – to any group (*large or small*) you may want him to address.

Avoid a consultant who is difficult to understand. He may speak too technically, or he may use complicated language, or simply may not be able to communicate clearly. Also avoid one who is uncomfortable speaking with your groups or is uncomfortable speaking in public.

## **TO FOCUS ON THE CLIENT FOR HOURS AT A TIME ... *COMFORTABLY***

A consultant should have the physical stamina to be able to sit for hours at a time discussing the details of your situation. Frequently, a consulting session stays in one place for hours, deeply engaged in an intensely focused conversation.

Avoid a consultant who – because of his natural energy level – can not focus on you and your needs for an extended period of time.

## **TO WORK LONG HOURS / TRAVEL ... *FLEXIBLY***

Your consultant should be one who has good health and physical stamina. Life on the road can be exhausting to a healthy person and can be devastating to one who is not in good health.

Avoid a consultant with fragile health. If fatigued he will not be able to give a full day's value.

## **TO USE PROFOUNDLY SIMPLE TOOLS ... *APPROPRIATELY***

Your consultant should have a wide range of proven tools (charts, illustrations, models, concepts, diagrams etc.) available to help you deal with any of your complicated issues in profoundly simple ways. It is also very helpful if he is able to spontaneously draw clarifying graphics – on a legal pad, grease board, overhead, flip chart – for you and your team.

Avoid a consultant who keeps complicating simple problems rather than simplifying complicated problems.

Bobb Biehl is an Executive Mentor.

In 1976, he founded Masterplanning Group International. As its president, he has consulted personally with over 400 clients. Since 1976 he has met one-to-one with over 4,000 executives (board members, senior executives, and staff members) and invested an estimated 40,000 hours in private sessions with some of the finest leaders of our generation.

Based on these thousands of hours of practical “rubber-meets-the-runway” experience, he has originated 35 resources (books, tapes, notebooks) in the area of personal and organizational development. These resources include published books entitled:

***Boardroom Confidence*** (Eighth printing)  
***Dreaming Big!*** (New release)  
***Leading with Confidence*** (Eighth printing)  
***Masterplanning*** (Fourth printing)  
***Mentoring*** (Fourth printing)  
***Stop Setting Goals*** (Second Printing)  
***Why You Do What You Do*** (Fifth printing)

Bobb is a Charter member of the board of directors of Focus on the Family. He is also a member of the board of directors of Liquid Metal (publicly traded). He graduated from Michigan State University (psychology major) in 1964. He also earned a Master’s Degree (counseling) from Michigan State in 1966. Bobb and his wife, Cheryl, have been married since 1964.

© 2007 Bobb Biehl – [www.ConsultingInstitute.com](http://www.ConsultingInstitute.com)