Session No. 527

The Secret Weapon—Your Edge for Success

Chris Ross, CSP, CPLP
Chief Executive Officer
The Engagement Effect
A division of Ross Performance Group, LLC
Anchorage, Alaska

Introduction

World-class consultants (and all safety professionals are consultants, whether internal or external) have a secret weapon known only to a few. This secret weapon is stronger than kryptonite, more powerful than nuclear fusion and more effective than a government bail-out program.

This secret weapon helps consultants forge strong relationships, produce dynamic and measurable results, and build trust. This secret weapon is also free, easy to learn and highly portable.

Successful relationships and results are a balance between inquiry and advocacy. Stephen Covey's sixth habit of highly successful people, "seek first to understand – then be understood," applies to highly successful consultants. First, some definitions:

- All safety professionals are consultants – whether we have internal clients, or we are external consultants. Because we typically do not have line or line authority, we are advisors; we must be persuasive in order to get the results we are seeking.

- So that means we all have clients. If we are external consultants, our clients are the customers we bill. If we are internal, our clients are the customers we serve – our boss, supervisors, employees, or departments.

Skilled inquiry produces a mutual understanding. Effective inquiry helps us to better understand what our client truly values and the client gains a much better clarity of his/her own situation and the possibilities and *feels* understood. The better job we can do of eliciting the client's story, the more we are able to match it to ours.

Most people know how to ask questions and hear what others are saying, yet few are consciously competent at developing a high degree of mutual understanding. They either lack a powerful methodology of questioning. lack the ability to truly listen with all their senses, or both, often while thinking this is surely not the case.

Consultants commonly resort to three traditional approaches to interacting with clients:

1. **We Tell.** When inquiry and advocacy are out of balance, the tilt is almost always toward advocacy. While “telling” is not always bad, it has a low probability of producing a solution that clients feel exactly meets their needs. Some problems with the tilt towards advocacy include:
   - What we chose to tell is not interesting or relevant to clients.
   - There may be no buy-in or ownership from the client.
   - They see us as arrogant or ignorant or both.
   - We lose the opportunity to match our stories, speak their language and build trust.

2. **We Accept**. Clients tell us what they want, and then we give it to them. Easy, isn’t it? Sometimes that is the right course, but have you ever given a client exactly what they said they wanted, but still ended up with an unhappy client? Some problems with passively accepting include:
   - The client could be wrong – but still blame us.
   - We have not demonstrated any thought leadership.
   - We may not exactly understand what we are solving or how to measure success.

3. **We Guess**. Of course we consultants do not call it guessing: we call it diagnosis, assessment, or analysis. We talk to our clients for an hour or two, ask a few questions, and then start guessing. What do we think they really need? What do we think the actual problems are? Why haven’t they fixed this before? Will there be any money to pay for this?

A Fourth Approach: Mutual Exploration

The fourth option is to mutually explore with our clients to develop solutions that truly meet their needs. This is not as easy as it sounds. World-class inquiry and listening skills *are not universally* practiced.

> The only way to influence someone is to find out what
> they want and show them how to get it.
> – Dale Carnegie

Barriers to Inquiry and Advocacy

To begin, we first must adopt a mindset of inquiry and listening. This tends to be incredibly difficult for many of us because we are so conditioned. We are conditioned to “be the expert” and have the answers. We are conditioned to “solve problems.” And we are conditioned to “act first, plan later.”

We face several other roadblocks to listening. While many of us have taken classes on communication, presentation skills, or even a class in PowerPoint, most of us have never taken a class on listening. And when we listen, we are rarely listening with the intent to understand. We listen with the intent to reply or we listen through the filters of our experiences, our backgrounds and our paradigms. As we listen to others, we are playing our own autobiography, and overlaying the speaker into our own experiences, instead of just listening to understand.

In their business bestseller, *Built to Last: Successful Habits of Visionary Companies*, Jim Collins and Jerry Porras write: "[Visionary companies] do not oppress themselves with what we call the 'Tyranny of the OR'–the rational view that cannot easily accept paradox, that cannot live with two seemingly contradictory forces or ideas at the same time. The 'Tyranny of the OR' pushes people to believe that things must be either A OR B, but not both."

But what do the visionaries, who want to succeed, do instead? According to Collins and Porras: "Instead of being oppressed by the "Tyranny of the OR," highly visionary companies liberate themselves with the "Genius of the AND"–the ability to embrace both extremes of a number of dimensions at the same time. Instead of choosing between A OR B, they figure out a way to have both A AND B." Our challenge is to begin to embrace the "Genius of the AND" and begin to open our minds to the possibilities that exist.

Further, we find it remarkably easy to be critical. In *Parallel Thinking*, Edward de Bono observes that criticism takes very little effort. The easiest form of contribution is to be negative; attacking an idea gives rise to an instant sense of superiority to the idea or the originator of the idea. Criticism is also one of the few ways in which people who are not creative can achieve something and become influential.

When criticism is a first step in discussion, it is usually the last step. Criticism shuts down dialogue, understanding and seeing things from the other point of view.

When it comes to having dialogue with our clients, Kahlsa and Illig (*Let's Get Real or Let's Not Play*) have identified dysfunctional behaviors of both consultants and clients. These behaviors have become entrenched in some people and organizations as years of win/lose conditioning and lack of dialogue and inquiry skills have led to poor results.

When the authors asked consultants what inhibited their ability to reach good solutions with clients, they were told:

"We don't listen."
"We make assumptions."
"We don't talk to the right people."
"We think we know what they need better than they do."
"We try to fit their needs into our solution."
"We need to make the sale."
"It takes too much time."
"We don't understand their business."

But our clients often have their own dysfunctional behaviors that get in the way of getting to the best solution. When interviewing consultants, the authors heard the following common complaints about clients:

"They don't know what they need."
"They can't articulate what they need."

“They don’t agree on what they need.”
“They won’t give us good information.”
“They won’t let us talk to the right people.”
“They are unrealistic about the time, money and people needed.”
“Politics and personal issues count more than business sense or common sense.”
“They procrastinate.”
“They won’t make decisions.”

Ironically, when people feel they are being manipulated into accepting your conclusion, rather than their own, they will often move aggressively in the opposite direction. The harder you try to “sell” people, the less likely it is to happen. That hard-selling behavior creates a lack of trust, a feeling of being used that really curtails dialogue and discussion. But when clients feel that you are truly helping them to succeed, focusing on their needs rather than your own, they are far more likely to share their perceptions of what success will look like. And the better you can understand what success looks like for your client the better the chance you have of achieving that success.

> “The moment there is suspicion about a person’s motives,
> everything he does becomes tainted”
> – Mahatma Gandhi

<u>Becoming a Trusted Business Advisor</u>

Trusted business advisors don’t start out with the goal of being trusted business advisors; they start out being value creators. We can only create value when we know what is valuable to our client:

> Creating value requires (1) meaningful information, which in turn requires clients to trust the path of openness and critical inquiry as laid out by the sales professional and (2) a comfortable level of trust on the client’s part that the information will be used in its best interest. Value creators passionately and effectively focus their intent on helping clients succeed. This intent frees them to truly look at the client’s business issues objectively without pushing their solutions—easing the way for open, honest dialogue where mutually beneficial possibilities can be explored (Khalsa and Illig).

A good place to begin the value discussion is with the organization’s key performance indicators (KPI). What are the metrics that drive and define success? For most for-profit corporations, KPIs revolve around shareholder equity, bottom-line profits, market share, employee engagement, cost control and other such measures. For non-profit or governmental organizations, KPIs may be financial (meeting budget or cost reductions), but are generally linked to “accomplishing the mission” (e.g. number of clients served, services provided, and so forth).

Make sure that you understand what are the primary drivers for your client. A good question to ask is, “If this program is successful, how will you measure the success? What will be different? What will have changed? In what ways will the KPIs be affected?”

Khalsa and Illig say, “We simply can’t uncover vital information or perceptions about business issues and constraints until the client starts talking—and they won’t start talking unless our intent is clearly focused on creating value for them. Intent is a conscious competence, not just a nice, soft quality to have—it’s learnable and provides the difference that makes a difference.”

If we measure trust by the free flow and examination of information, we can actually gauge the probability of both our delivering real value and the client's willingness to act on it with us. This trust/meaningful information measurement, combined with our competence, credibility and reliability, can create the pathway that clears the way to achieve success.

To become true value creators or trusted advisors, we must find a way to fuse our IQ, EQ and XQ together. IQ defines our intellectual horsepower; our business acumen, industry knowledge, and expertise. This is our competence and credibility. Our XQ is our ability and reliability to execute and make things happen. The best programs and strategies in the world, if not properly executed, are worthless. And finally, our EQ is our ability to communicate, to empathize, to share, to frame effective dialogue, and inquiry. EQ, in a way, will measure our ability to listen and decipher complex messages.

We must become skilled at dialogue, inquiry, and diagnosis. There is a famous proverb, "Prescription without diagnosis is malpractice," which rings as true for safety professionals (consultants) as it does for physicians. We must have a thorough understanding of the needs, the desired outcomes and the success measures of our clients before proposing solutions.

Bibliography

Canadian Institute of Cultural Affairs. "The Art of Focused Conversations: 100 Ways to Access Group Wisdom". Gabriola Island, BC: CICA, 2000

Collins, James C. and Porras, Jerry I. 1997. *Built to Last: Successful Habits of Visionary Companies.* New York: Harper Business

Covey, Stephen R. 1989. *The 7 Habits of Highly Effective People.* New York: Simon & Schuster.

deBono, Edward. *Parallel Thinking*. Toronto: Penguin Group, 1994.

Hyman, Ronald T. 1980. *Improving Discussion Leadership.* New York: Teachers College Press,.

Khalsa, Mahan and Illig, Randy.2008. *Let's Get Real or Let's Not Play*. New York: Penguin Group.