

Management Consulting: *Helping Businesses Get 'Unstuck'*

Joe has always been a successful leader, but he has found that the strategic planning system that once served him well is no longer working. He used to be able to plan on a five-year cycle, but now even one-year cycles are too long. Regardless of his best-laid plans, other forces in the organization keep overriding his strategies. What's more, the things that always helped him see what needed to be done and motivate his staff are also failing him. Joe is deeply frustrated. How can it be that – at a point in his career where he thought he knew everything he needed to know about his job – each day could be such a struggle?

By Glenda Eoyang & Royce Holladay

Does this describe managers at any of the corporate clients *your* EAP works with? Since Joe is hardly alone in his troubles, chances are it does. Uncertainty and chaos are the “new normal” – and leaders everywhere are forced to rethink the most basic aspects of their work.

Forget fixing the “root cause” of challenges in a world where diverse and multiple forces from innumerable forces influence decisions. The world is changing at the speed of thought – and it is beyond complex. We have to find new perspectives and tools that help us meet those challenges.

In the past, the world was stable enough to plan for a three-to-five-year horizon. Strategic planning allowed business leaders to identify measures and activities that gave them a sense of control. But in today's 24/7, ultra-fast society, it's impossible to create strategies that leaders can count on – measures that will hold their meaning; or a stable, unchanging picture of the future. What happens is, the business leader tries working harder. He or she reads the newest leadership books. He/she tries using the newest versions of old strategies, but nothing works. The manager has hit “the wall,” and sees no options for actions. The manager is stuck, but how do Joe and others like him get “unstuck”?

The Adaptive Action Approach

As mentioned, Joe is far from alone. Organizations everywhere are “stuck” in old habits and old ways of thinking that no longer work. But in the “Adaptive Action” approach, asking three simple questions can help frame seemingly insurmountable problems and get moving in a positive direction. The EA practitioner is in a perfect position to help.

Adaptive Action takes the business leader past the first level of seeing how his organization works. It enables the leader to see deep into the dynamics of decisions, interaction and behavior to help identify the most productive and best-informed actions.

QUESTION #1: What?

In the *What?* stage, those engaged in problem solving simply describe reality. What's happening in the organization? What's going on in the larger world? In this stage, people list and describe, as thoroughly as they can, the current status, focusing on the challenge they need to address.

The difference lies in the need to go beyond what has always been seen and described. People who engage in Adaptive Action have to see past the surface descriptions and begin to explore underlying patterns. Here's an example: *Joe asked for help with communication in his department. In his “What?” stage, he started by describing ways people did not have information they needed and lots of disconnection across his department. Describing the “What?” in the traditional manner left him still frustrated and confused, without any real options for action beyond what he was already doing. On the other hand, by describing the “What?” through the Adaptive Action approach; he was able to address a broader range of issues, knowing that communications challenges were only one symptom of greater, systemic issues he could address.*

The following questions helped Joe and his staff use the *What?* stage to explore the deeper dynamics of their interactions and communications. The focus of the question is listed in bold italics and would work for most situations:

- ❖ ***What do I know for sure*** about what is communicated, and how it's communicated?
- ❖ ***What patterns do I observe, in part, and in the greater whole***, about the ways people share, gather, and use information at the individual, group, and team levels?
- ❖ ***What feelings or reactions do I see*** among staff members as they share information or learn new information?
- ❖ ***What lies on the horizon*** in terms of need to share information or in terms of the fallout from how communications currently occur?
- ❖ ***What stories have I heard*** and from whom, recounting difficulties gathering information and/or difficulties in getting staff members to hear and to respond?
- ❖ ***What has changed*** over time, relative to this challenge?
- * ***What are the gaps in what I know*** about this challenge or seemingly related situations?

QUESTION #2: So what?

In the *So What?* stage, employees ask “So what does all this mean?” They explore the implications of their work, and identify current rationales and emergent forces that may be shaping their world. They consider the risks and benefits that go along with the uncertainty of the situation and explore the dynamics of the challenges.

Joe and his staff collected information about the patterns that took them deeper into the situation than they had looked before. When they began to explore at a deeper level, what they saw were patterns of employees who expected to have information “spoon fed” to them and used “lack of communication” as a scapegoat anytime people felt they needed to cover their own lack of performance. They saw examples of

people not seeking information they needed to save time in development or decision making. They knew there might be many reasons for this phenomenon – general complacency, lack of accountability, unclear expectations, for example – but they needed more information to be able to make wise decisions about their next actions.

“Joe and his staff – and so many others like him – came to recognize that Adaptive Action offers new ways to think about the limitations in traditional planning processes.”

Questions asked at this stage might include:

- ❖ ***So what doesn't fit*** – in terms of how employees seek, use, and share information, as opposed to what we expected to see? And in terms of what we need to have happening?
- ❖ ***So what is the difference between what we want and what we have*** when it comes to sharing and using information?
- ❖ ***So what led us to this point? So what might lead us out?*** How can we change expectations about seeking and sharing information? How might we change how employees step into accountability for knowing what they need to know?
- ❖ ***So what constraints can I observe?*** What limits/supports effective flow of information? What limits/supports use of information? What limits/supports accountability for sharing information?
- ❖ ***So what areas are the most relevant?***
 - ***Boundaries?*** Where does information flow well? Where does it get blocked? Where it's received? Where it's well used?



- **Differences?** In how employees seek and share information? In terms of how they use – or ignore – information? In what information employees want or use?
- **Connections?** What brings employees together? What makes meaning out of the information they have? What extends into other parts of the organization? Newer connections? Connections that are older?

❖ **So what are my options for action** to shift how employees seek, gather, generate, and use the information that is available to them in the organization?

QUESTION #3: Now what?

In the *Now what?* stage, employees take action and then assess the impact on the challenge at hand. Did the situation change? In what ways? What were the unintended consequences that might have emerged? What's occurring now? What am I uncertain about now? If employees are paying attention, they'll find themselves back to the next *What?* stage, describing the patterns that occur after taking action. That's the nature of Adaptive Action – employees end up at the start of another cycle.

Based on their new understandings about what was really happening in their department, Joe and his staff began to find ways to reward and recognize effective flow of information. They clarified expectations about individual responsibility for gathering and sharing data. They began to model in public and unambiguous ways what they wanted to see happen among all staff members. And at each stage they took time to check the impact of their actions. They looked for ways to adapt their plan and move toward greater effectiveness, based on what they discovered about continuously emerging and shifting patterns.

Questions asked at this stage might include:

❖ **Now what will do** to help employees share, gather, and use data and information?

❖ **Now what I expect to see as systems change?** What will be the behaviors that will indicate change? What operational systems might change and in what ways?

❖ **Now what unintended consequences might arise?** What should I watch for as employees embrace or ignore the actions we take?

❖ **Now what will mark success or failure?** How will I know these actions are or are not working? What will I see at the systems level? What will I see among my work teams? What will I see different among individuals?

Summary

Joe began to use this feedback-enriched method of planning to move his department forward. Because they seek external information, they are less likely to be surprised by shifts at the organizational level. They are better able to incorporate new ideas and address emergent challenges.

More people are involved in their own Adaptive Actions and so are better able to see how their work and innovations contribute to the success of the organization as a whole. Joe has begun to engage in Adaptive Action planning at all levels of his department and is once again taking pride in the leadership he is able to provide.

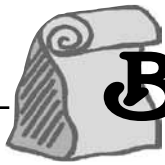
Joe and his staff – and so many others like him – came to recognize that Adaptive Action offers new ways to think about the limitations in traditional planning processes.

❖ First, it lets them name and explore the uncertainty in their systems.

❖ Second, it promotes short cycles of action and feedback, which allows employees to respond to unexpected events and take correction action more quickly.

❖ Finally, it allows employees to see more deeply into their challenges, which gives them options for taking action to change their organizations. ■

Glenda Eoyang and Royce Holladay are co-authors of "Adaptive Action: Leveraging Uncertainty in Your Organization" (Stanford University Press, 2013, www.adaptiveaction.org).



For Managers: *Differentiating EA Services from Other Consulting*

It is not unusual for organizations to have multiple sources of consulting for managers. One example is the organizational development (OD) consultant. This person creates long-term, organization-wide plans, such as change management and employee satisfaction.

Executive coaching describes another source of workplace consulting. This type tends to be reserved for senior leadership positions in organizations. The executive coach creates goals that are related to the development of the manager and the success of his/her career. Regrettably, first-level supervisors and middle management often aren't able to access these costly services.

With these brief comparisons established, what distinguishes the EA professional's role in consulting to managers? Roman and Blum's brilliant work in defining EAPA's Core Technology describes our consulting role in at least two of their eight components. The clearest consulting role is found in the first component:

❖ *“Consultation with, training of, and assistance to work organization leadership (managers, supervisors, and union officials) seeking to manage troubled employees, enhance the work environment, and improve employee job performance.”*

Unlike other consulting disciplines such as OD, executive coaching, and business consulting, the EA consultant plays an influential role in identifying and reducing behavioral risks. Furthermore, this individual typically offers higher levels of confidentiality, which promotes more self-disclosure by the manager – as opposed to executive coaching or OD. I offer the following proposed “elevator speech” to define our consulting work:

❖ *The EAP consultant is a specialist in the human side of business, an expert in human behavior*

and communication. The consultant utilizes clinical and organizational knowledge to enhance the customer organization, especially in areas relating to employee productivity, performance, conduct, and behavioral risk.

❖ *The Employee Assistance Program is a place where managers come to figure out human behavior, which may be perceived as random and unpredictable. The consultation may result in:*

- *The creation of an action plan for a manager; and*
- *The opportunity to provide a workshop to a workgroup, relating to interpersonal skills. ■*

Source: Jeffrey Harris, a licensed Marriage, Family and Counselor and a CEAP. He has provided management consulting to a wide variety of organizations throughout his 16-year career in employee assistance, including the U.S. Postal Service, The Bank of New York Mellon, Wells Fargo Bank, the City of Long Beach (CA), and others.

Editor's Note: This column originally appeared in the Volume 41, No. 1 issue of “The Journal of Employee Assistance”, the magazine of the Employee Assistance Professionals Association (EAPA).

