

The Master Expert solves complex technical problems effectively and quickly via insightful diagnosis and shaping long-term solutions that improve processes and create opportunities.

The Expert Art of Solutioning

How might the careful utilization of a consulting approach facilitate better outcomes and be more rewarding for you and your stakeholders?

IN THIS CHAPTER, WE WILL EXPLORE:

- How deploying an advanced consulting model helps experts build and implement solutions that create quantifiable and reported value.
- Why does the way we ask discovery questions matter?
- What barriers get in the way of experts deploying advanced consulting techniques?

MANY EXPERTS DESCRIBE THEIR work as handling others' requests all day. Fielding such requests isn't always the optimal way for us to spend our time. Our expertise is best directed toward activities delivering greater business impacts. It's natural that our know-how is sought out to solve problems. It's our conviction that the judicious use of consulting mindsets, processes and techniques can help us and our stakeholders to focus on and address the right problems, build more impactful solutions, deliver the sought value, and measure and report progress.

High-impact solutioning, i.e., using our curiosity and critical thinking skills to understand complex issues, is something every expert relishes. It

requires us to combine our technical and industry know-how (market context) to design imaginative solutions. The best of us engage stakeholders along the way. However, all too often, solutioning feels like we settle for a so-called expedient but sub-optimal approach.

So many of the experts we work with express frustration with how this problem-solving aspect of their role currently works. They report being asked for the same fixes time and time again. Many complain that their stakeholders engage them too late in the process and provide incomplete briefs. Experts report that their stakeholders don't seem to be clear on what exactly they want. They're fed up of having to rework solutions time and again because when they deliver what they were asked for, the "solution" is not on target.

A very common complaint among experts we work with is that they often feel they're not given sufficient context.

"We need to become expert in resisting the instinct to jump to the solution."

And finally, many experts report that they're unable to demonstrate the true value of the contributions they could make because stakeholders push them to implement already decided solutions without sufficient assessment or diagnosis. Although experts do their best to make sense of requirements and build solutions accordingly, they often end up looking like chumps because they've received a bad steer.

This chapter and the following three look at the consulting mindset, the phases of a consulting assignment, skills, and even specific questions to ask so experts can transform transactional requests into real opportunities to add business value and move our contribution up the value chain.

Let's first explore what we mean by "adopting a consulting mindset and approach" in contrast with simply "taking the order."

A Consulting Mindset

IN A PERFECT WORLD, solutioning would look like this: deploying our best expertise in determining what outcomes our stakeholders wish to achieve and why, and how to best pursue those advantages so as to co-create a solution with our "client."

Any time we don't do our own analysis and simply build the solution that someone else has asked us to build, we're colluding in our own sub-optimal engagement. We're failing to consult. We have succumbed to becoming non-value-adding order takers. We have left the shaping of the solution to individuals who lack the full know-how to do so alone. It needs to be a

partnership, a co-creation. Our stakeholders should bring their contextual knowledge, such as the issues as they see them and the business outcomes being sought. We should bring our diagnostic and design skills, our content knowledge in our areas of specialism, and our grasp of market context. Then, *together*, we can shape and implement a solution that elegantly addresses the defined needs.

Shifting to a consulting approach involves numerous skills and processes. In the first instance, we need to become expert at resisting the instinct to solve the problem, and jump to the solution, before we adequately understand the issues at hand or gather relevant information.. This would include understanding precisely how the issues show up in concrete organizational results. Secondly, we need to master selling the requesting stakeholder on the importance of doing so. We have to persuade them we're not going slow, insulting their thinking (by not accepting their conclusion about what's needed), or being difficult to work with. We'll explore with our stakeholder's the idea of "moving off the solution", carefully transitioning the conversation to "what is it we're trying to do exactly?" and away from "please implement such and such."

"As experts, we have to earn the right to open up a broader organizational conversation."

If we don't master "moving off the solution," we run the risk of stakeholders thinking we're wasting their time with these broader questions. This may be because they believe they've already figured out what's needed, whereas it's likely that we would find their analysis far from exhaustive. In most cases, it's not just that they've already decided on the solution they want us to implement, but they've also become psychologically and emotionally committed to their "solution."

Another risk when we start asking questions about broader organizational requirements is that our stakeholders might find this presumptive of us, as if their own "joining the dots" thus far is regarded by us as inadequate. They ask themselves, "what would a technical expert, coming from a very specialized knowledge domain, know about organizational strategy, competitors, and long-term requirements?" They expect us to stick to and operate within our technical bubble, leaving the big-picture organization-wide expertise to them. In reality, our stakeholders may also have an underlying concern (usually subconscious) that the technical experts are asking questions that they should've *already* asked but didn't. These types of questions often mean our stakeholders aren't sure of the answers, and this both embarrasses and irritates them.

The truth is that, as experts, we have to earn the right to open up a broader organizational conversation. Moving off the solution requires emotional intelligence and skill. We need to ask the questions that will enable us to see how the issue affects the organization. And we need to ask them in a way that will engage our stakeholders rather than put them offside. We'll go into more depth on this in the next chapter.

The third issue is one of our own making. If we're going to explore underlying issues, we have to move beyond merely understanding the technical requirements by also asking questions that adequately explore all potential outcomes.

The Dangers of Jumping to a Solution

LET'S LOOK AT A real example of how a stakeholder wanting us to simply implement their solution proved problematic.

Melinda is the organization development manager at Perfect Providores, a large grocery wholesale and distribution business. Her boss is Arnold, the HR manager. One day, with no prior discussion, he asked her to develop a one-day workshop on “commercial acumen” over the next week or so. The natural response of an expert, particularly when a request like this comes from a superior, is to agree that we'll do it. The first thing we might do is gather requirements, so we ask questions like:

“Who is the workshop for? How many will attend? Exactly what areas of commercial acumen do you want them to know more about?”

Questions like this are *necessary*, but they're not *sufficient*. We need to ask more. The answers tell us about the *informational* or *content requirement*, which is the knowledge and/or skills gaps to be addressed. But they don't tell us about the specific underlying business rationale for such skill-building. As Master Experts, that is where we need to go, and this is where Melinda went.

“I'd love to develop a commercial acumen program for you. I did that at my previous company,” she told Arnold. “Out of curiosity, what are some of the business issues you're hoping to address by increasing your people's abilities in this area?” This is an example of how to elegantly “move off the solution.” Melinda assured Arnold that he would get his program but then transitioned the conversation to exploring the underlying business issues.

“By asking one simple question in the right way, Melinda shifted the focus from means to ends.”

Such questioning gets to the heart of what's driving the request. By understanding the desired underlying business outcomes, Melinda got the

opportunity to *deliver measurable business impact* rather than merely *delivering a workshop* (Arnold's proposed solution) as requested. Without exploring the desired business outcomes, even a well-delivered workshop could fall short of the intended impact.

In response to Melinda's question, Arnold explained that competitive pressures in the grocery retail market were creating problems for the organization's customers—independent grocery retailers. Perfect Providores' account managers could no longer simply take orders for groceries for the retailers to sell. They needed to become strategic advisors on how those businesses could better compete with the large supermarket chains. Unless those retail businesses improved their sales performance, they would soon become unviable, which in turn would very negatively impact Perfect Providores' entire business.

Note that Melinda asked an emotionally intelligent question. She asked “what business issues are you hoping to address?” She didn't ask “Why do you want to do this?”

Why questions can be confronting. By asking Arnold what business issues he was hoping to address, Melinda was not challenging him or asking for a justification, she was just making an inquiry. She moved off the solution. She shifted the conversation from the solution (discussing the design of a workshop on commercial acumen) to the underlying business needs that the solution is intended to address. Melinda managed to do this by asking just one carefully composed question.

Once she teased out the underlying business issues, Melinda then explored evidence and impact. This not only allowed her to explore the entire context of the request but her subsequent questions also helped Arnold further flesh out his thought process. She quickly discovered that Arnold actually wasn't the best person to comprehensively address all her questions about underlying business issues. Arnold was actually only an intermediary for those who actually “owned” the requirements.

As we'll see shortly, Melinda needed advanced consulting skills to persuade Arnold to give her access to the senior business leaders who had the complete answers.

“There are four consulting phases to pass through. In order, these are Discovery, Designing, Implementing and Evaluating.”

If we ask the right questions in the wrong way, this can still go badly. We worry the client will feel challenged if we ask “why do you want a commercial acumen solution?” in a blunt manner. We can see that by Melinda simply

changing a *why* question to a *what* question—an emotionally intelligent choice because Melinda is thinking about how the client will emotionally respond to the nature of the question—she transformed the conversation from *means* (a workshop) to *ends* (improved business performance). This is Master Expert behavior.

An Expert Solutioning Model

BY RESPONDING TO THIS request in this way, Melinda is initiating the first phase of a classic expert consulting model: Discovery. The model is described in Figure 42.1. There are four phases to apply, and these are in a strict order: Discovery, Designing, Implementing, and Evaluating. We’ll provide an overview here and go into more depth in subsequent chapters.

Capability: SOLUTIONING

An Expert Consulting Strategy

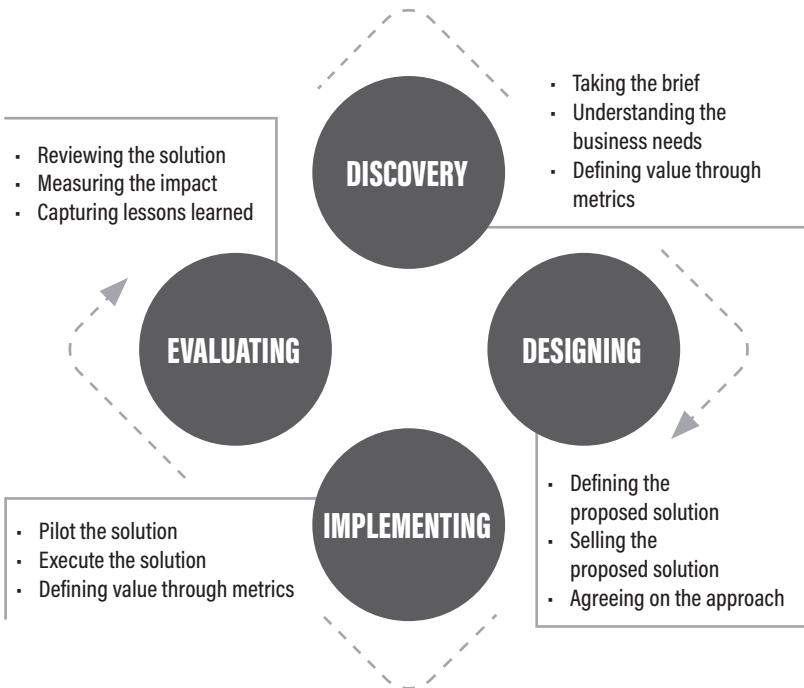


FIGURE 42.1: An Expert Solution Framework

Discovery

THIS INITIAL PHASE OF Solutioning goes by different names in different environments, such as *diagnosis*, *needs analysis* or *requirements gathering*. Experts who operate below Master Expert level often limit this to a technical needs analysis. For example, “What do you want the software to do?” At best, they learn only about the technical specifications the stakeholder has identified. This limits the expert to returning to the stakeholder with a technical answer to what is often a deeper enterprise question.

Master Experts, on the other hand, try to discover the underlying organizational rationale behind the stakeholder’s request or the business outcome(s) the problem is meant to address. When they’ve fully understood the underlying organizational needs, the Master Expert will then come back and propose a holistic solution that addresses the organizational outcomes the stakeholder is really concerned with.

Properly handled, the Discovery phase should provide us and the stakeholders with the conviction that no specific solutions should be implemented until we have gathered the relevant baseline data. Neither party should feel bound by the initial solution ideas the stakeholder has put forward. Rather, we’ll use our full expertise to thoroughly diagnose what’s needed and then design accordingly.

Design

DESIGN REFERS TO THE formulation of recommended solutions to solve problems or address needs, and the positioning of those recommendations with key decision-makers. If we have conducted a thorough discovery, we’ll also have worked out precisely who the key decision-makers are, as well as their decision criteria.

“No plan survives its collision with reality.”

– Susan Scott

We’ll have gathered sufficient data to make compelling arguments as to how our proposed solution will effectively address the requirements and why the related expenditure and effort represent a good investment. We’ll have also unearthed any likely risks or complications, which will also be addressed by our proposed solution.

As part of the Design phase, it’s essential to consider any likely challenges to the implementation. After all, our recommended solutions don’t exist in a vacuum. If our stakeholders lack the skill or time to successfully implement

our ideal solution, then we may have to adjust the solution or include upskilling or additional staffing.

We'll also need to consider the role we'll play during the implementation. Are we the project manager or overseer? If we're not in this role, who is? Are they a suitably skilled, committed and available individual? How will we remain informed about implementation progress and any issues arising? Will we be able to actively respond if necessary to address anything that might threaten the successful implementation?

Are we prepared to tweak our solution to better realize the benefits rather than stubbornly insist that our solution is the best one, even in the face of evidence to the contrary?

Implementation

ASSUMING THAT OUR RECOMMENDATION for the solution we've designed is adopted, we then need to implement it or oversee the implementation. If our Discovery has been thorough, there should be very few surprises during the Implementation phase. It's vital that we get the implementation right because the first two phases create expectations. A failure to realize the anticipated benefits may reflect poorly on our diagnosis and/or design, even if the true culprit happens to be poor implementation.

The Implementation phase is where actual value needs to be delivered and where our expertise is confirmed. People may never appreciate that we recommended a perfectly relevant solution if inadequate implementation fails to deliver the promised results.

The Implementation phase is reasonably straightforward, or it should be. It's simply the execution of the agreed solution according to the documented plan, adapting as and where necessary (with the achievement of the agreed aims in mind). In the first instance, the implementation often takes the form of a proof of concept, where we only roll out the solution to a clearly defined and limited set of users and compare their results to a norm or control group.

“Failure to conduct a PIR means that the team fails to learn from the mistakes made.”

There's a saying that “no plan ever survives contact with the enemy,” attributed to the famous WW1 Prussian General Helmuth von Moltke. In modern organizations, this has become “no plan survives its collision with reality,” a quote attributed to Susan Scott. It may become obvious in the early stages of implementation that the plan needs refining. In that case, we

should liaise with stakeholders to ensure we have their support in tweaking the process, documenting any changes in the evaluation report.

All too often, the Implementation phase is where things can come unstuck. This is where our tendency to be more of a detached advisor rather than an active driver of outcomes can be the cause of our undoing. No matter how thorough our diagnosis, no matter how well designed our solution, there will almost inevitably be unforeseen implementation issues.

These can be appropriately addressed if the implementation is properly monitored and managed by someone with sufficient expertise and skin in the game. If the implementation is left in the hands of people who lack the requisite skills or commitment, it's very likely we'll end up shouldering the blame when things don't turn out as the stakeholders expect.

Many organizations have now adopted an Agile methodology, a prototyping approach that assumes things won't be right the first time out of the box. This has its advantages and disadvantages, but its flexibility is very beneficial, and some of the concepts can be usefully applied in many situations.

Evaluation

THE EVALUATION STAGE MEASURES and reports the effectiveness of the solution. We evaluate whether our implementation delivered what we intended (and likely said) it was going to. This is often achieved via a post-implementation review (PIR), which can be formal and multi-staged or informal and simply a conversation checking back in with pre-agreed outcomes and measures described in the business case.

In our experience, PIRs are rarely carried out, and if they are, they're not done effectively. It's worth briefly exploring why every project doesn't have a PIR. Some PIRs don't happen because of circumstances like:

- The team delivering the implementation is quickly disbanded and re-allocated to other projects, thereby making a post-implementation review (PIR) difficult.
- There is no specific milestone to say the project is finished, so it's never quite the right time to conduct a PIR.
- The team may have radically changed since the inception of the project, so the initial business case and measures have been lost.
- There is no proper leadership and accountability loop associated with the project to make a PIR happen.
- The senior sponsor is just "too busy" (i.e., doesn't place much value on gauging whether the intervention and associated time, expenditure and effort delivered the anticipated benefits).

The persons typically most disadvantaged by the lack of reporting quantifiable progress are the experts whose hard work and insights end up going unrecognized.

“No PIR means we are missing an opportunity to communicate our full expertise.”

Because this is a book about being a Master Expert, we’d argue that no self-respecting expert would collude with such lightweight thinking. Even if it’s 30 minutes on a video conference, or even an email exchange, a minimum standard ought to be that the results are matched against expectations. There are some very good reasons for this, which we’ll describe shortly.

But before we do that, let’s explore the more Machiavellian reasons post-implementation reviews don’t occur.

- Measurable organizational requirements were not adequately discussed or uncovered in the Discovery phase.
- Clear measures to track, which are necessary to evaluate whether the solution makes a difference, were not clearly defined or baselined—or unhelpful measures were defined (e.g., subject to so many other variants that the specific impact of the implemented solution is impossible to verify).
- No one can find the original business case. This happens much more than you might imagine, either deliberately (it was buried) or accidentally. Often, such cases are not adequately documented.
- Those responsible for conducting a PIR won’t do so because they know that the report will show a failure to deliver the projected value or outcomes.

Whatever the reason, failure to conduct a PIR means that the team and the leading experts fail to learn from the mistakes made. They don’t identify the incorrect assumptions built into the solution or implementation plan, which means it’s possible, and maybe even likely, that the organization will make the same errors again. In a world where every organization has limited resources, this is a very poor process. It suggests the lack of an adequate performance culture in the organization.

In a perfect situation, the Master Expert is able to produce a post-implementation report, along with the colleagues involved, that demonstrates:

- How the need identified in the Discovery phase has been satisfactorily addressed.
- Whether the solution recommended in the Design phase has had the desired impact.

- What results have been produced.
- Any lessons arising.

Without the production of such a report and a cogent articulation of the impact of the solution, it's likely that the value created by the solution will remain unknown and thus unappreciated. The stakeholder who asked for the solution doesn't know with any certainty what they got out of the exercise, but they'll certainly be aware of the costs and the disruption associated with the solution's implementation.

“Effective solutioning is also about providing our stakeholder with a superior service experience.”

If we don't commit to and insist on this final Evaluation step, which stems from an effective Discovery phase, we're missing an opportunity to communicate our full expertise or worth. We're failing to prove to all stakeholders that the solution we've implemented actually addressed their intended outcomes.

Moving Up The Expert Value Chain

MOVING UP THE VALUE chain means working with stakeholders to get closer to the underlying business requirements. This is the case even if the owner of the business issue(s), who has the most to gain or lose from a solution or opportunity, isn't the one who directly engages us. In our example, Arnold was not the owner of the business issue. He was the messenger.

Effective Solutioning is not only about asking penetrating questions. It's about providing our stakeholder with a superior service experience. That's why you'll notice that we refer to the owners of the needs that we're being asked to address as “clients.” We want to provide them with an optimal “client experience.”

The intention behind our questions is to discover how to provide them with what they're really after, not just with what they're asking for.

When we make inquiries about the desired organizational outcomes, it often becomes apparent (both to us and the Arnolds of this world) that:

- It's vital to find answers to the legitimate questions asked.
- It's necessary to connect the inquirer with the person who can satisfactorily answer their questions.
- It's important that we don't put “Arnold” offside, making him feel inadequate, deficient, or like someone to be bypassed.

He may say, “I don’t know the answer to the question.” Our emotionally intelligent response needs to be something like “Who might be able to provide such information, and when might I be able to talk to them?”

He may say, “Don’t bother the business leaders with this. They’re too busy.” And we might persist intelligently with “I am worried that without such a proper understanding, we might end up wasting even more of their time with a poorly thought through solution that fails to deliver.”

When the Master Expert has perfected the art of asking the right questions for the right reasons, the stakeholder will welcome them and find value in the exploration that the questions prompt.

Developing a Dual Identity

AS EXPERTS, WE TEND to have a strong sense of identity, with strong points of view about our technical specialty. That means listening is often not our first instinct, which can give the impression that we lack empathy and social skills.

We all want to increase our effectiveness within our organization and for our stakeholders. To do this, we need to develop the capacity to listen and empathize. For Master Experts, this is a foundational enterprise skill upon which many other capabilities rely, including consulting, coaching, influencing, leading change, identifying other people’s motivations, and engaging in difficult conversations.

In the mind of our business stakeholders, we need to develop a dual identity, being seen on the one hand as a highly proficient technical expert, and on the other hand, as a well-informed, value-adding business partner.

In the next few chapters, we’ll explore the three expert roles of Solutioning:

- **Problem Identifier:** ensuring that underlying causes of problems are comprehensively identified and diagnosed.
- **Problem Solver:** ensuring that the right solutions are identified and implemented, which future-proof the organization and realize long-term benefits for internal and external customers.
- **Active Responder:** ensuring that the technical function is proactively responsive to the organization’s needs, and that limited resources are deployed on the right tasks for the right reasons.

TAKING ACTION

Growing Our Solutioning Skills

IF THIS IS AN expert role in which you believe you could add greater value, here are some high-level suggestions for actions to take:

▶ ADOPT A CONSULTING APPROACH

When engaged to address a particular problem, deploy the Discovery phase to undertake a detailed discovery of the related issues, including gathering relevant evidence of how those issues show up and their impact on the organization's key performance indicators (KPIs). Some questions we may wish to ask ourselves:

- Am I guilty of merely “taking the order” or just seeing problems from a technical perspective?
- To what extent am I regularly very well-informed about the underlying organizational outcomes and impacts, and to what extent do I remain ignorant of the organization's underlying intent?
- Can I articulate the case for taking the time to step away from the solution to investigate the underlying issues? How might I build my stakeholders' trust and get them to devote the time to this process?
- What data will provide me and my stakeholder with greater insight into the exact problem we're being asked to solve? What questions do I need to ask and answer in order to have a holistic understanding of everything that needs to be in place for the underlying organizational issues to be addressed?

Considering these questions will allow you to bring more of your expertise to bear and ensure that your solutions are holistically designed and focused on the intended organizational impact. This will positively enhance your brand. You'll be perceived as more strategic and more focused on outcomes.

▶ LOOK BEYOND TO ANTICIPATE FUTURE PROBLEMS

If we aspire to operate at Master Expert level, we have to become very future-focused. This means being able to see around corners. Our ability to detect early warning signs for emerging problems that may negatively impact our organization (or, indeed, offer an opportunity) enables us to be far more effective when dealing with them. Questions we might wish to ask ourselves:

- It's almost certain that somewhere in the world, someone is already experiencing a "future" problem, so how do I tap into this information? Where is it likely to be?
- Are there forums I can join to participate in that discussion and predict future problems?
- Are there insightful people in my network who can be leveraged?
- Do I regularly run future risk discussions that enable me and my colleagues to be more prepared for future issues?
- Am I sufficiently plugged into what is happening outside my technical domain so that problems experienced by other industries are visible to me and can be considered in my own context?