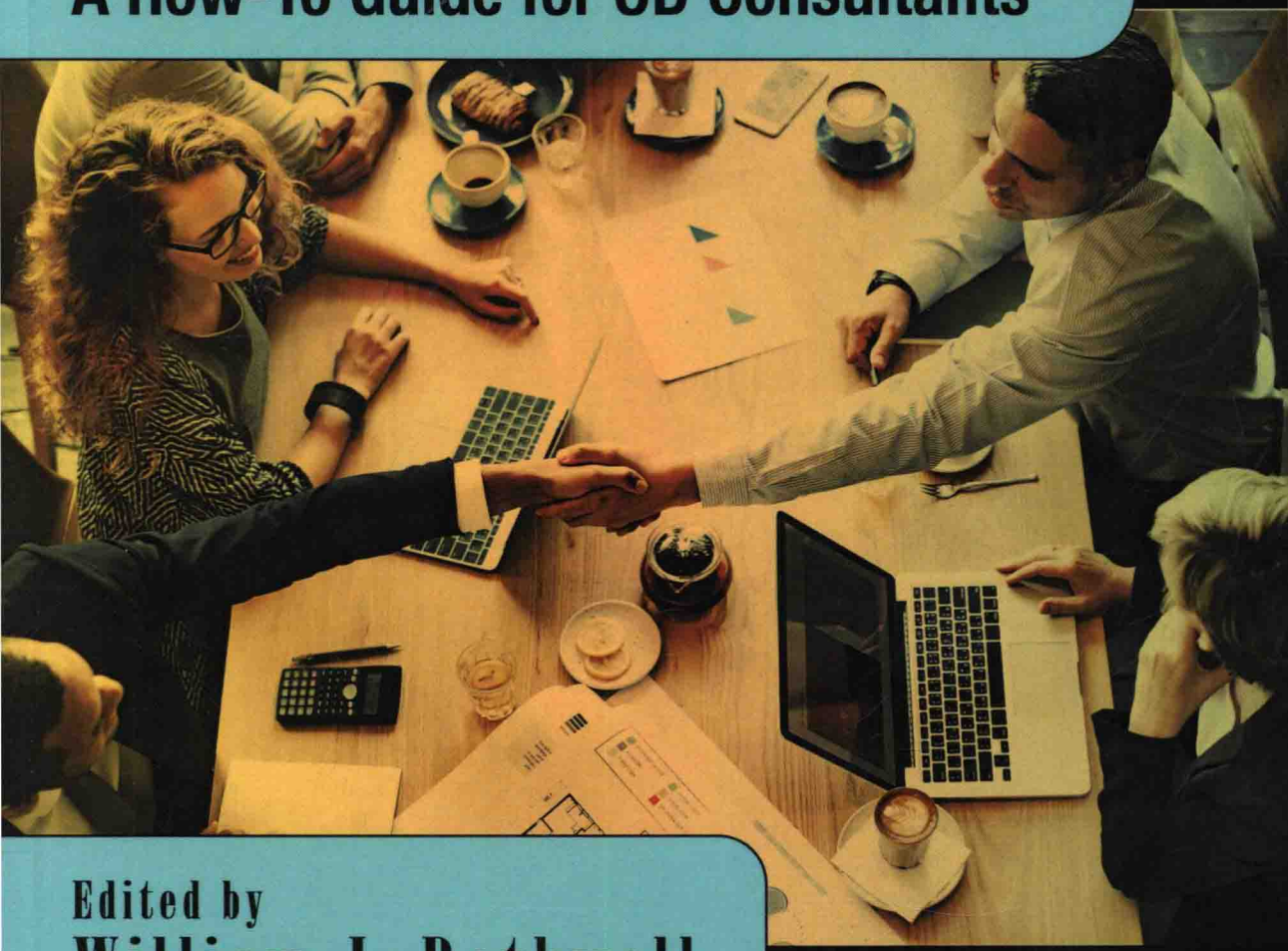
Marketing Organization Development Consulting

A How-To Guide for OD Consultants



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Organization Development (OD) consultants often face dilemmas when they market their services because there is a gap between clients' expectation and the actual role of OD consultants. This book is about how to overcome that issue by finding effective marketing strategies for a different approach to consulting.

Marketing Organization Development Consulting: A How-To Guide for OD Consultants focuses on the challenges faced by internal and external consultants in marketing and selling their services. By distinguishing between performance consulting and Organization Development (OD) consulting, this book demonstrates why marketing and selling OD consulting services are unique. This book meets not only OD consultants' needs by reflecting the philosophical background of OD and distinctive marketing challenges but the needs of Human Resource Development (HRD) managers who are interested in promoting or selling their change interventions within their organizations.

This comprehensive book:

- Reviews important terms and popular tools used in the marketing process and outlines the many roles a consultant must fill to obtain and keep the business (i.e., marketer, salesperson, brand manager, account management).
- Describes the criteria for self-evaluation as an OD consultant. It examines how to identify your strengths and the competencies you need to develop based on OD competencies.
- Provides an introduction to actionable steps and resources for organization development, change management, and performance management consultants to evaluate unmet needs and opportunities through a niche market for consulting services.
- Covers how to communicate value to your target customers and how to brand your service.
- Describes various channels of OD marketing such as viral, word of mouth, and social media marketing.
- Reviews selling tactics for your consulting service and discusses the importance of having a defined sales process to which you adhere.

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Marketing Organization Development Consulting

A How-To Guide for OD Consultants

William J. Rothwell dedicates this book to his wife, Marcelina V. Rothwell. She is the wind beneath his wings.

Jong Gyu Park dedicates this book to his wife Bora Kwon and his son Seonjae Park.

Jae Young Lee dedicates this book to her husband, Sewon Song.

Preface

Almost everyone is familiar with the role of a consultant. Above all else, a consultant helps others. But many managers expect the consultant to play medical doctor.

Medical doctors play a helping role, to be sure. Patients go to a physician with pain or other symptoms. The physician, trained in diagnostic methods and a diagnostic protocol, typically begins by asking questions about signs and symptoms causing pain. When sufficient information has been obtained in that fashion, the physician moves on to a physical exam and then more intrusive examinations. The diagnostic approach finds the *root cause(s)*—what is causing the pain—and only then can the physician prescribe medicine or therapy to alleviate pain or address other signs and symptoms.

In the consulting field, many clients expect consultants to behave as physicians do. Consultants are expected to ask questions, gather information, and make recommendations to solve problems. The consultant plays the expert and gives the client an answer. It is then up to the client to implement the course of treatment sufficient to solve the problem.

The problem with the expert (medical doctor) approach to diagnosis is that it assumes that the consultant is the expert and the client needs treatment. Its focus is always on what is wrong and what causes pain. It builds up the credibility of the consultant at the expense of the client's ownership in change. Clients have no ownership in the problems, solutions, action plans, or metrics identified by the consultant because they do not understand how consultants arrived at the conclusions and recommendations. More often than not, external expert consultants' recommendations are rejected because the client has no buy-in to what the expert believes. That leaves a bad impression in the minds of clients in working with consultants.

But there is another way. It is the approach used by person-centered clinical psychologists. That approach differs completely from the medical doctor approach.

Clinical psychologists assume that clients already know their problems, already have good ideas about how to solve the problems, but for some reason are not implementing the solution(s). The psychologist's role is to help clients identify the barriers that keep them from implementing their own solutions and knock down those barriers.

Organization development (OD) consultants function like person-centered clinical psychologists. OD consultants assume that the people inside an organization are actually the best experts on what problems face the organization, what causes those problems, how important those problems are, what solutions should address the problems, how those solutions should be measured, and how those solutions should be implemented. The real problem for OD consultants is that the members of the organization do not agree among themselves about their problems, what causes those problems, how important it is to solve them, how to solve them, how to measure the success of solution implementation, or how to implement the solutions. The challenge is herding cats to a common goal. It is a matter of facilitating the change rather than imposing it based on expert knowledge.

In the OD field, one big challenge is overcoming the assumption of managers and other stakeholders that the consultant is the expert, a "doctor" who always has "medicine." While there may be comfort to be gained by assuming that other people always have solutions to our problems, it is not an effective assumption in the long term. It will not stick because people do not buy in. Nor does solving other people's problems lead those people to take responsibility or learn how to solve their own problems.

It is this assumption that consultants are always experts that leads to marketing challenges for OD consultants. Everyone wants someone else to tell them what to do. Once they are told, they reject it and then blame the consultant. Much time, money, and effort are then wasted in a fruitless search to have experts solve problems. When consultants succeed and find recommended solutions, many clients refuse to believe them.

So, how do OD consultants market their services when clients expect them to behave in ways they have been trained not to behave? Therein is the marketing dilemma. This book is about how to overcome that dilemma by finding effective marketing strategies for a different approach to consulting.

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Audience for This Book

This book is for current or aspiring OD consultants and managers who wish to apply facilitative approaches to change. It addresses the marketing issues affecting both those who work inside organizations (that is, internal OD consultants) and those who work outside organizations (that is, external consultants). It should also interest others, such as human resource professionals and operating managers, who have reason to manage change in organizational settings and to market or sell that change.

Overview of the Contents

This book comprises 12 chapters. The guiding framework of the book is an implicit model of marketing.

Chapter 1 is entitled "Unique Challenges in Marketing Change Management, Performance Consulting, and Organization Development." It defines these special terms and briefly describes the histories of each field, emphasizing how these approaches to consulting differ and why that is important to marketing.

Chapter 2 reviews important marketing terms and popular tools used in the marketing process. This chapter also outlines the many roles a consultant must fill in order to successfully get and keep business (i.e., marketer, salesman, brand manager, account manager) and then discusses the unique differences between marketing OD and marketing other approaches to consulting. Furthermore, it draws a distinction between marketing challenges for internal and external consultants.

Chapter 3 describes the criteria of self-evaluation as an OD consultant. It examines how to identify your strengths and the competencies you need to develop based on OD competencies. This chapter discusses the various consulting styles and how one needs to flexibly adapt his or her personal style to the role that the client demands. Also covered are what a capability statement is, what components it should include, and some tips on how to develop an effective capability statement.

Chapter 4 describes determining needs and opportunities about the market. It provides an introduction to actionable steps and resources for OD, change management, and performance management consultants to evaluate unmet needs and opportunities through a niche market for consulting

services. The chapter will also cover how to identify a niche market and how to develop strategy for OD marketing.

Chapter 5 discusses the basics of the request for proposal (RFP) and key aspects to consider about the client when writing a proposal. This chapter further differentiates OD consulting and management consulting and how the proposal reflects the difference, as well as distinguish the difference between work as a contractor/vendor, freelancer, or consultant. In addition, this includes discussing the financial considerations when OD consultants prepare the proposal.

Chapter 6 examines pricing consulting services in OD. It examines such issues as the following: what are common pricing situations in consulting, what makes the pricing of OD consulting services different from pricing in management or performance consulting, and what philosophical issues should be addressed by OD consultants as they consider their pricing strategies for their work and for their clients.

Chapter 7 describes various channels of OD marketing such as viral, word of mouth, and social media marketing. This is important because much business in external consulting work is driven by this marketing. This chapter describes and illustrates through examples the power of viral marketing and social media and how it's used to sell your services.

Chapter 8 covers how to communicate value to your target customers and how to brand your service. This chapter also includes how to differentiate yourself from the competition and brand your consulting service(s). Integral to marketing is developing a marketing communication plan. Here, we discuss creating a plan to direct your marketing efforts. This includes discussing the process of communication, channels to get access to your market, and setting clear objectives of your marketing efforts.

Chapter 9 reviews how to sell your consulting service. This chapter discusses the importance of having a defined sales process to which you adhere. Covered are the steps in the sales process using a sales funnel approach to visualize the process. In addition, this chapter also covers presentation skills, elevator pitches, lead generation, and cold calling. An elevator pitch is especially important for the internal consultant because opportunities may present themselves during their normal day to get buy-in from their coworkers or managers.

Chapter 10 discusses executive communication and getting past the gatekeeper, chief executive officers, and board members. In addition, we discuss how to get past the gatekeepers and get to the financial buyers and decision

makers in a company. Techniques for both internal and external consultants are included.

Chapter 11 discusses different way to use common evaluation methods to prove value for performance management, change management, or OD consulting services. The chapter covers return on investment, discounted cash flow, net present value, cost of capital, and hurdle rate. Then we explain how these metrics are used by many companies and how you can use them to sell your services.

Chapter 12 discusses the future. What is the future of marketing for OD? We offer some predictions about the future of marketing OD.

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