

Newsletter #19, March 2011

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### It All Sounds the Same, but Is It?

Recently we listened to a panel of consultants describe how they worked. It all sounded the same. Broadly speaking, the consultant starts with a research or discovery phase; moves to synthesis, presentation, and discussion; and follows by identifying viable options. Finally, the client chooses a path, creates a plan and gives some thought to tracking progress. Whether the goal was financial planning or organizational restructuring, the process didn't vary significantly. So consider how hard it is to differentiate among proposals for the same project.

Yet some engagements are much more successful than others — why? We devote this issue to answering that question with the hope that it will help foundations and charities use their limited consulting dollars for greater impact.

But first, our bias: successful consulting makes a noticeable difference. It leads to a sustained change in an organization's behavior that improves its effectiveness. A client actually uses new insights, and realizes the client's goals by implementing an achievable plan. She can point to tangible indicators of better results, externally and/or internally, all of which help the organization fulfill its mission more effectively. Clients even reap the added benefit of reusable tools, frameworks and processes.

#### Succinct Presentations - Key Issues

Nothing focuses attention more than a short, instantly understandable presentation. Highlighting the most important issues focuses attention and eliminates distractions. Nonprofit executives get inundated with information ranging from mundane to critical. Even when delivering bad news, a consultant helps more when she presents findings that an executive can't miss, mistake, or avoid.

Effective presentations emphasize both key opportunities and inescapable realities. They help the executive concentrate on the two or three pivotal issues, when addressed, that will move the organization forward. In a successful engagement, the consultant distinguishes between what really matters and what is merely nice-to-know, those distracting bits and bobs that won't change the ultimate decision. For example, we've found it effective to paint an agency's financial picture with a chart or two rather than have a client pore over pages and pages of data. The client grasps the issue faster, and you can spend more time discussing it, instead of "setting the stage".

#### Tough Discussions - Implications and Choices

Successful consulting provides a "safe space" for frank, candid, and often pointed discussions where executives can explore an organization's key opportunities and harsh realities. Tough discussions make clear the choices available and allow leadership to deliberate over their implications for the entire organization. That means asking clients questions like: Why do you think you can "grow your way out of a deficit?" "Raise that amount of money, when you've never done it?" or "Realize that particular programmatic outcome when nobody has ever achieved it?"

Successful consulting helps an executive recognize and separate what s/he can and can't control. It encourages leaders to step back, be more objective, and consider an issue from multiple viewpoints.

An exec can consider each option carefully: weigh its pros and cons; mull over potential risks and how any might be mitigated; and think through an option's possible impact on the organization, even its culture and values. Deliberations like these also help the executive surface an action's unintended consequences, like how program expansion could require more supervisory staff, increase unfunded costs, or strain quality control processes.

If the appropriate staff and board members get involved in evaluating options, the decision-making frequently improves, too. While a consultant can provide a useful framework for considering options, the leadership, board and staff understand the organization better than any consultant and can lend valuable insight and perspective. Candid conversations that seek different viewpoints help leaders make good decisions, increase staff commitment to their implementation, and raise the probability of the organization's future success.

#### Realistic Action Plans

Successful consulting includes creating realistic, feasible plans to turn decisions into reality. In some cases, the organization has the expertise, time, and energy to create an implementation plan on its own. But frequently the consulting engagement includes a plan as one of its "deliverables".

An action plan is a "roadmap" that highlights the critical steps that the leadership and staff will take to carry out their decision(s) and realize their goal(s). It lists the key activities necessary to achieve the objectives. For each one, it identifies the person responsible and able to make the relevant decisions, estimates the time needed to complete it, and sets key milestones and decision points along the way. It may also list additional parties who need to be informed or involved.

A good plan is:

- **Feasible**, if followed people can actually succeed;
- **Reasonable**, sufficient organizational resources to do in the time expected; and
- **Usable**, enough detail so the path is clear, but not too much to constrain staff or too cumbersome to adjust along the way.

An effective action plan also includes a **dashboard monitor** that tells leadership - clearly and concisely - how it is doing against the goals and key activities it has set for itself and highlights any issues. It provides needed information for the executive to celebrate its accomplishments and make any adjustments to the plan.

#### Finding Successful Consultants

It's great to know what to look for, but how can you **really** tell who can be successful with you or your grantees? We played back recent interviews amongst ourselves and realized we would all "say the right things", but that didn't really help a client make an informed decision.

So ask for examples that highlight the characteristics we describe. Really probe. It will yield more useful information. Candid conversations with a consultant's references offer insight. Find out what changed from the project, where an engagement was particularly successful, where it wasn't and why. You'll learn a lot about what worked for them and, as a result, what might work for you.

**We Want Your Knowledge!** Let us know what you are doing to increase your impact, whether your grant-making, program effectiveness, leadership or organization's productivity. Your insights can help strengthen the sector.

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#### Most Meetings End Before Decisions Are Made

According to a recent Bain & Company study, managers spend 50% or more of their time in meetings, but two-thirds of meetings end before participants make important decisions. It is not surprising that 85% of the executives find them unproductive and are dissatisfied with the efficiency and effectiveness of their organizations' meetings.

Source: *Decide & Deliver: 5 Steps to Breakthrough Performance in Your Organization*

#### Merger Talks Increase, but Agencies Still Uncertain How to Proceed

We have been talking about mergers and collaborations for years, and in fact think it is one of the most under-valued strategies for building stronger organizations, expanding programmatically or ensuring long-term sustainability. Collaborations aren't the best approach in all cases, but when circumstances are right, one + one really = four. For more merger information like roadmaps, success factors and pitfalls, read [articles on our website](#).



14 Horatio Street | Suite 1E | New York, New York 10014

Tel: 212.645.0536 | Fax: 212.658.9046 |

[info@krasneplows.com](mailto:info@krasneplows.com)

[www.KrasnePlows.com](http://www.KrasnePlows.com)

