Audio File

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Transcript for book critique of *Humble Consulting: How to Provide Real Help Faster* by Dr. Edgar H Schein

Audio recording by Jordan Abraham, Lindsay Masters, Sam Barnes, and Tricia Cervenan

Tricia Cervenan 0:02
Hello and welcome to the review of Humble Consulting: How to Provide Real Help Faster by Dr. Edgar H Schein. Dr. Schein has a PhD from Harvard and went on to join Sloan School of Management at MIT after a brief four year interlude in the army. There Dr. Schein went on to both conduct research and work as a consultant with within business organizations becoming an expert on organizational culture, and how people anchor anchor themselves in their careers. In 2012, it was noted that he had been published 179 times including 14 books, Humble Consulting, which was published in 2016, would push that number to 15. In his own words, Dr. Schein says that he views his thoughts as hypotheses that he puts out into the world to be, quote, discarded, accepted, or elaborated on by the next generation of observers and quote, and that because of that, he feels confident in telling his readers that quote, this is how the helping process works. And therefore, this is what you should do when you're trying to help end quote. Our team today, consists of myself, Tricia Cervenan, as well as Jordan Abraham, Lindsay Masters and Sam Barnes. We're going to lead you through an interview style review of the book Humble Consulting, in hopes that it gives you a better understanding of the content and how it relates to the other material from our class. So let's get to it.

Lindsay, we'll start with you. What would you say is the difference between Humble Consulting and other types of consulting?

Lindsay Masters 1:41
Well, I noticed a few differences in Humble Consulting and his model. Um, as I was kind of working through the book, one of those first differences that I think readers are going to be really quick to notice is that he encourages OD practitioners to really kind of step back from clients and contracts, if that right fit doesn't exist, and instead, help them find the proper resources for their needs. This was one of the first things that struck me as I dug into the book. Because it's such a stark contrast to what we learn in our professional culture here in the US. There's such a big push to just, you know, take what you can get when you're starting out, put in some miles, get some experience, then move along to do things you find more personally in work might be a better fit for you. As someone who's new to move into the industry from nursing, I've already felt some of that anticipatory pressure to be ready to settle just to get projects or a job, but Shane's work has actually challenged me to pump the brakes on that thinking a little bit. I found that the core of Humble Consulting as a model is summed into three parts, one be helpful to be caring for the client. And three, be curious. Now this is the first text that I've read throughout the program. And the courses that I've taken so far, that have mentioned, let alone emphasize these assets, especially in the way that Schein does. He encourages OD practitioners to be genuinely curious and to be humble enough to be curious, which is kind of a skill unto itself. He outlines a few cases where he's helped redirect a client's initial ask to identify the true issue simply by allowing himself to be curious about the client what he does, and why the right one. In order to be curious in a way that serves the client and isn't self serving. OD practitioners need to allow themselves to care for the client, and what he refers to as a level two relationship earlier on in the relationship. And of course, the ultimate goal for Schein in this model is to be helpful to the client and the organization. This course should guide every question, every suggestion and every recommendation throughout the duration of the contract between the practitioner and the client. If a practitioner cannot maintain these core aspects with the client, that's the point at which Schein recommends stepping back to connect the client with the most

helpful resources. I found that his model really challenged some of the traditional sorts of models that we've seen so far in the program. For example, Anderson who wrote organization development, the process of leading organizational change, he outlined a few models that were really dressed to contrast the core of Humble Consulting the expert, the doctor, patient, and the mechanic models are all discussed in both Anderson's and Schein's textbook briefly. For example, the expert and doctor patient models rely really heavily on the consultant entering into a situation and making expert recommendations without much ado, and then presenting the solution to the client. At that point, the client can either accept the recommendations or dismiss the consultant, whichever they kind of tend towards. Schein challenges this model by suggesting that curiosity and caring help consultants drill down to what the true issues are very quickly, instead of just that cursory expert glance and jumping right into a diagnosis. One final note that I'll throw out here, I think that his model is different still from even the organization development consulting model, which Anderson puts out in his text. The OD consulting model really focuses on the OD process, and ensuring that the client is involved, which is a fantastic start, for sure. But I think the difference comes from, you could complete the OD process entirely on a level one relationship. And consultants still may not boil down to the real brass tacks of the situation, without that crucial core of helping and being genuinely caring and curious, that Schein calls for in order to really be genuinely helpful to the clients.

Tricia Cervenan 6:13
Thanks, Lindsay. That was really interesting. We really appreciate that. And Jordan, as we briefly mentioned at the start, Dr. Schein is known as an expert in organizational development, and one of his focus areas is organizational culture. So how does an organization's culture affect how a consultant approaches their work?

Jordan Abraham 6:36
Thanks, Tricia. So as students, future leaders, change agents and organizational design practitioners, it's our job to create change that's going to be impactful for an organization in order to do that change has to be really the desire as well as sustainable. This directly relates to one of our other articles that we read for class by Richard Boyatzis, where he describes ICT change theory, and what it entails to actually create desired sustainable change. So is it something that people actually want? And if it's not, how would that sustainable so Schein really takes this model and runs with it when he goes into the book and defines how we should consult in through which level our connection should be. So 30 days, he goes on to define three levels of relationships we can create through our types of consultation. The first level would be a transactional and classic business relationship, in that these are very impersonal. And just as the name suggests, very transactional, these kinds of relationships can result in some solution in orientation around that. But the consultant can struggle to diagnose the issue, since they're really only getting to know the organization on a surface level. Level Two is where we can begin to see direct change. And this is where we create personal relationships with our clients. In a level two relationship, we show our curiosity, empathy and our willingness to personalize the solution to the situation. personalization is critical. Because we're going to go beyond just the exterior of the issue, we're going to be begin to look at the real root causes, it creates a more authentic bond with our clients, and we can create real connections in real solution. The third level is the only level in which time said we should really avoid this. These are defined as intimate relationships in problems that they can cause will be fraternization, nepotism, as well as favoritism. culture can be affected based on the type of relationship we have with individuals within the organization in here, Simon was one to emphasize how crucial crucial is to get to know all the details of what's going on, versus what's actually happening. Sign goes on to say if we change who's in the room change, who's doing the sensemaking and also change the nature of the conversation from people solving and discussion and debate, to genuine dialogue. All kinds of

new adaptive moves to our people will come. dialogue and openness can really help in this situation and creates a deeper connection between us and our client and those we're trying to impact. We can be in the dive into the real root of the issue, and whether it's actually a cultural problem, or something else can really start to help the organization. Thanks, Trisha.

Tricia Cervenan 9:33
Thanks, Jordan that really clarified the types of relationships that Dr. Schein discusses in the book. And he clearly highlights level two relationships as being the ideal for consultants. So Sam, can you expand on the ways that Dr. Schein suggests consultants manage and or form these level two relationships?

Sam Barnes 9:55
I'd be happy to. So in order to be really helpful, that requires you moving past the level one, or level one professional relationship to a more personal level two working relationship. Level two relationships are generally useful when parties to a problem or opportunity depend on each other to advance goals, usually organizational goals, some requirements to reach a level two working relationship, our commitment to helping curiosity and caring for the client and the situation has been as has been shared already. Schein really emphasizes allowing yourself to have genuine curiosity to ask open ended questions and empathize with the person you are helping. This connects with Anderson page 127, where he talks about how the contracting phase on during the consulting process allows the parties to become familiar with each other before the real work begins. To really move into a level two relationship personalization must occur between the consultant and person he or she is working with. as a consultant. as a consultant, you might find it easy to just shrug off real concerns of the client. But it is important to emphasize empathize with the client. Schein talked about personalization being one of the keys to moving toward a loyalty relationship. You've described personalization as quote, personalization occurs through some combination of asking more personal questions, listening empathetically, both for the situation and clients feelings about it, and or revealing more personal thoughts and spontaneous reactions. In quote. Once a consultant and the client have moved to a level two relationship, it really facilitates a nice space for dialogue between client and helper. This helps because a consultant asked open ended questions that should facilitate greater thought and problem solving. A quick reminder, the basis for this book is Humble Consulting, it's important to remember that relationships or relationships are best built, when the consultant is approaching the situation with humility, realizing that the client is facing a real issue, and willingly hired the consultant to help also realizing that the client hired the consultant to help but the consultant might not have all the answers. And that's okay.

Tricia Cervenan 12:06
Thanks, Sam. So, Lindsay, as we learned in our reading of the text by Andersen and many of us know from our own experiences, one of the biggest struggles of being able to be a change agent or a consultant going towards change is getting resistance from others. So what tools or methods does Humble Consulting provide us to be able to come back?

Lindsay Masters 12:37
That's a great question. And there's actually a couple of things that I found through the texts that address this issue. Actually, I'm going to say that the core of his model can help combat resistance on its own. by demonstrating that you're there to help as a partner who cares by building trust and asking those open ended questions that he lays out for us. as a practitioner, you can more effectively boil down to the root of any resistance that exists so that it can be directly addressed. And I might even go so far as to say I imagine that this might help resolve any resistance before even bubbles up. He also cautions being aware of cultural differences, which is a great reminder, both organizationally and geographically

speaking as a source of resistance. He shares an example where he was blind spot, his plans and his actions as a consultant for the company. In this example, he wound up walking the readers through the steps of inquiry to discover and understand his foe PA, which I found to be really helpful as someone new to OD consulting, he wound up adjusting his approach ever so slightly, which completely removes the roadblock in that situation. I think that just serves as a great reminder that sometimes resistance is truly just a result of misunderstanding or not having the full picture before you. Schein also recommends including key players in the decision making and planning processes in order to help reduce resistance and boost buy in and actually he talks about that on page 119 if anyone has the book and is interested. While this isn't necessarily a new notion for me, since I've seen the suggestion in several texts before, I do think it's a great reminder, especially in this context, since it seems so often to fall by the wayside. It does take a little bit more extra effort to incorporate it into the process. But it really increases the odds of success and decreasing the amount of overall time spent adjusting to the changes, especially if you can get those key players involved and really excited about the projects that are on the table. Another way that he suggests we can reduce resistance is by helping get the higher status person to help create the environment and he talks about that on page 115. I've not seen as mentioned in too many other books but it is really heavily featured and Lencioni is The Advantage, which he published in 2012. If you guys are interested in looking that one up, it emphasizes over and over and over again that the top dog in any given team or organization, whichever is relevant to the situation, must be the one to set the stage. If you've got a leader of the pack who gives permission creates a safe space establishes trust and allows dialogue to take place. That's a huge advantage. And in many cases, it's actually necessary to be able to just applying some of what China's taught us through His pages. An OD practitioner could absolutely coach whomever is in that hot seat to help set the appropriate tone for the organization. And one last point here, which I think is absolutely huge, and I've yet to see anywhere else, is sometimes the right action is actually to gracefully bow out if there's resistance particularly to the consultant themselves. Schein provides a case example, where he entered a small organization as both a participant and a leader, and playing a particular strategy that wound up being a really poor fit for the group. He received scathing feedback from one member and wound up conducting private conversations with other members to fully understand the picture. He was humble enough to recognize that he was not the right fit to help the organization in their current state. And together, he worked with the other leaders to gracefully bow out and transition to another leader so that the organization could have a chance to flourish. And being humble enough to fully receive feedback, continually assess the situation, like active, help remove the resistance in this case, and I really greatly admired that he didn't feel the need to be the one to fix it all, which I think practitioners sometimes might fall victim to. It absolutely gave me the confidence having read this case, to be able to say, when it may be my time to bow out in the future, but it's what's best in the interest of the organization.

Tricia Cervenan 16:57
Yeah, I will second that, that I've not seen in other books. The suggestion to bow out and I noted that as well that this book was very interesting in that way. And so unfortunately, though, sometimes when we encounter resistance, really, oftentimes when we encounter resistance, it can lead to failure. And so Sam, what steps should a consultant take if they do have a salad here?

Sam Barnes 17:27
So this question actually kind of reminds me of a movie that I watched with my daughter this last week, called frozen two, if any of you are familiar. But so in Frozen two, it reminds me of the time when grandpappy, the troll, the grand patrol, tells on an Elsa that he can't see the future. And so Ana then asks, What Then what should we do. And he responds and says the next right thing. And so it kind of connects back to what shyne talked about in the book about adaptive moves. And so he talked about

how some things are just so complex. And it's very normal for businesses to want to really get down to that root cause analysis, or other kind of things that kind of get to the basis of what's going on. And he's just suggest that we should just encourage adaptive moves. Thank you.

Tricia Cervenan 19:49
Thanks, Sam. Yeah, it's almost like saying bowing out isn't a failure. And that, that that takes great humility. So, Jordan, you are in a well rounded Leadership Program at Gonzaga University. And based on what you have learned in your classes, what has Dr. Schein gotten wrong? Or is he missing in this book? And what would you recommend that he add?

Jordan Abraham 20:19
So I think to start Dr. Schein did a, just to say he did a really good job writing the book, and it does cover a lot in really dives deeply into what he calls the art of Humble Consulting. There were more so a few areas that I thought he could have expanded and maybe given us a few recommendations, as we're looking to come into the field and do something similar to what he was doing. So the first recommendation I really have for Dr. Schein, is to dive a little bit more in depth about level three relationships. And the reason I say that is because all that was really stated in the text is, Hey, this is what we need to avoid, for very loosely defined terms. Then the next area that I would really encourage Dr. Schein to talk about, and he probably does at some other point, or through some other literature is how he was able to get a lot of his business, he was able to, to discuss several different case studies throughout the book in which he had some sort of connection to the organization either through his name or through his alma mater, being the MIT Sloan School of Business. So I don't think he would necessarily face a challenge similar to students in our program, where they may not get face time with a lot of individuals in the in the program, they may not be able to network, like Dr. Schein was through his completion of the program at the MIT Sloan Business School. So how would someone in our shoes really make a namesake or get that foothold in the industry like he did? and get that business without having the name brand school or anything like that not to come back as a bad school. But where do we start?And the last suggestion I would have for Dr. Schein would be regarding the topic of diagnosing the problem versus solution orientation. There were numerous times where Dr. Schein would appear to be very solution oriented, but may have dismissed diagnosed organizational issues. So as a consultant, we really do need to focus on the diagnosis, it makes sure that we get all the facts of what's going on to ensure the accuracy of our solution. in certain instances, this can be a challenge, since we're getting our details from the other people in the organization. And we have to take that at face value. In one of his case studies, he actually did struggle to get information due to it being considered to be a sign of weakness to consult with someone from outside of the organization. While this happened, he really did struggle that helped the end client, because he wasn't able to implement an actual solution. Due to nomina managers wanting to be seen as weak, he did try to distribute a pamphlet to help them try to change some of their processes. But it was actually never distributed due to some of the organizational issues and the cultural issues that he faced, he really wasn't able to diagnose that issue. So, you know, again, kind of what we do in that situation, do we do we try to re diagnose or, you know, in some cases, he did bow so it, it's a very fine line, and I think it would be a good area for him just to expand upon a little bit more.

Tricia Cervenan 24:10
Fair, fair. Thank you. Thank you for that critique. Um, so, Lindsay, you talked earlier about how this book, you mentioned, one or two things specifically that this book had that you hadn't gotten from other books? You know, we talked about the bowing out. So can you tell us what did this book make you

consider about what other things so this book make you consider about organizational development that you haven't gotten from any other materials?

Lindsay Masters 24:47
Yeah, so one of the things was Schein was really the first one who showed me that it's okay to take whatever time that I need with the entire process as a whole and not just with the diagnostic process. When I read through Anderson's text detailing the OD process, I really couldn't help but feel that there was a really rushed sense to it. And I kind of got some of that feedback from my peers as well. And perhaps it's just because of the medium. It's written for a textbook. But I really left that reading, feeling like there was no room to linger in the process, which kind of left me feeling a little uneasy Schein details instances where he's completely addressed client problems in one or two questions. And others work. He's worked with companies for 12, or he's had blasting off contracts with others. This specifically gave me a really huge sense of ease to read through this because to me, it kind of gives me a little bit of freedom in my mind as I tried to visualize what that process will look like when I get to be hands on with it. This was also the first text that I read that walked me through the inquiry process. And Schein does so in the vein of his model, of course. But the way that he teaches readers to do this also encourages practitioners to take whatever time they need, through all those processes based on the cues that they receive from their clients. And of course, it's all guided by curiosity. This inquiry process also introduced a way to enter into true dialogue relatively early on with a client, which is a little bit different. By being authentic and curious in our responses as an OD practitioner Schein, the conversation could very artfully be guided. So I really felt like to give us a pat on the shoulder to get us in the right vein, which is really cool. Um, it really does feel like an art form. For me. I feel like he gave us a nice balance of providing the necessary tools, and being thorough and describing how one may need to use them and when that might be. But it's really clear from what he says that the practitioner has to be in tune with the situation to know what's appropriate, and at what times. As a nurse, I've used similar methodologies to work with my patients. And the same strategy never ever, ever works twice. From what I've been exposed to, it certainly seems that that would be true in OD practice. Even though I haven't gotten to get my feet wet yet. I would say that it's probably both an art form and a science and assessing and adapting are key to success. Schein, writes his book in a way that really felt like he was investing in helping me build good habits to guide my work as an OD practitioner to be of service to my clients with their introduction, Tricia.

Tricia Cervenan 28:40
Thanks, Lindsay. Yeah, the whole idea of learning more about how to learn and that there's no repeatable processes really stood out for me as well. So thanks for thanks for covering that. It's really helpful. All right, team, coming down to the end, one final question for you all. So would you recommend this book? And if so, who for? So Sam, let's start with you.

Sam Barnes 29:10
Alrighty, so I would say yes, I would totally recommend this book. I felt like it was a great book. It was an easy read, for the most part. I feel like it really fits into the Gonzaga, just what kind of program the Organizational Leadership Program very well. It kept me engaged the whole time. And I think that anyone who wants to learn how to help others should read it, even if you're not in a consulting role, you know, per se, but anyone that was out there, I think it would be a good fit for them.

Tricia Cervenan 29:46
Thanks, Lindsay, what are your thoughts?

Lindsay Masters 29:51
I would absolutely recommend this book. I think it is a fantastic resource for students and new OD practitioners. Just because it really is like it's guided to help form healthy human centric habits from the get go. I definitely think that I'm going to have a different practitioner style, because I've read this book. That said, I also think that it could be a really great resource for current practitioners who are interested in learning new techniques to maybe move away from a solid lead expert model of practice as well.

Tricia Cervenan 30:28
All right, Jordan, do you agree?

Jordan Abraham 30:31
Yeah, I definitely agree. I think, you know, Schein does a great job of defining the frame of mind we should go into when we enter a consultative approach. So I would definitely recommend this to executive executives, leaders, you know, students in the program to continue to read as well as the the practitioners, you know, being a change agent or an organizational design consultant.

Tricia Cervenan 30:57
Awesome. Well, that about wraps it up for us. Thank you so much team, for your fantastic critique. It was really interesting. And to everyone listening, we hope you enjoyed hearing our critique of Humble Consulting: How to Provide Real Help Faster by Dr. Edgar Schein. And if you're interested in hearing more from Dr. Schein himself, he's going to be doing a virtual talk with his son, Peter Schein in February, and that is to promote the release of the latest edition of their book, humble inquiry. And you can sign up at pnodn.org/event-4042348. That's pnodn.org/event-4042348. On behalf of the of the humble consulting team, Jordan, Lindsey, Sam and myself. Thank you so much for listening.

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