

EFFECTIVE CONSULTING CONVERSATIONS: GAIN BUY-IN FOR YOUR RECOMMENDATIONS

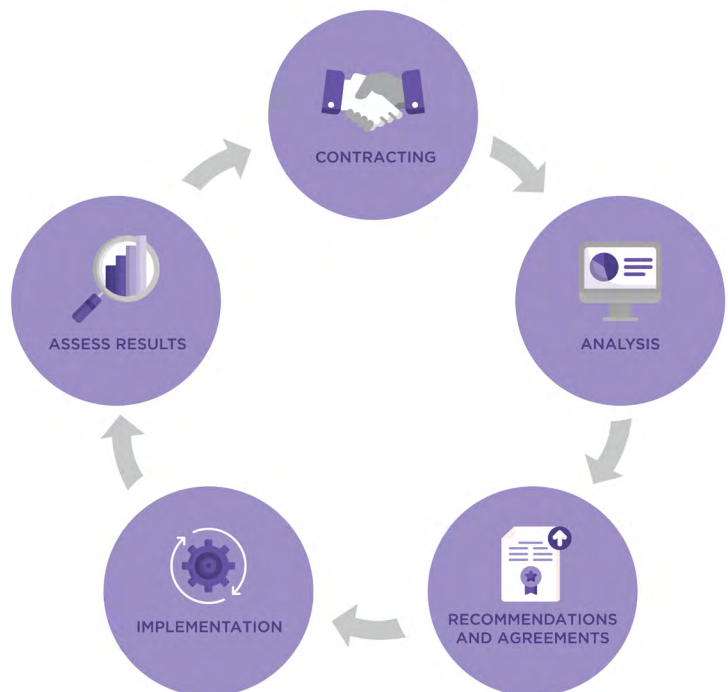
The third phase of Training Industry's **Comprehensive Consulting Model** is recommendations, which is the time for learning leaders to present their findings, recommendations and success metrics to key stakeholders. They also address resistance and negotiate to gain buy-in.

During the recommendations and agreements phase, you should:

- Present findings.
- Present recommendations, including success measures.
- Address resistance and gain buy-in.
- Renegotiate timelines and resources, if necessary.
- Output – documented agreements with stakeholders or sponsors.

Skills required to be effective during the recommendations phase include:

- Funneling data – each piece shared should have some action that is under the client's control.
- Identifying and working with different forms of resistance.
- Presenting personal and organizational data.
- Focusing on how any organizational problems identified can be replicated with your project.
- Not taking negative feedback personally.



Preparing for Your Recommendations Conversations

The preparation worksheet will help you consider issues likely to surface during the meeting and prepare you to address them.

► What is your goal for the conversation?

Do you want permission to proceed with your recommendations, or are you seeking additional information to validate an obstacle you've uncovered?

► Plan for enough time for discussion.

You should spend as much time on discussion as on presentation.

- ▶ Review wording to make it nonevaluative and nonjudgmental.

Seek neutral language.

- ▶ Identify parts of your message that are likely to evoke a defensive response or disagreement.

Will some parts put an unfavorable light on a person or area of the organization? Are there unpleasant surprises in your findings? Is there something you will recommend that will not match the stakeholders' expectations?

- ▶ How will defensiveness be exhibited?

Know your audience. Are they likely to withdraw from the meeting, to sit silently, to argue with you, or to lash out verbally at someone else?

- ▶ What can you ask or say to get the defensiveness expressed?

You need to understand your audience's concerns or points of disagreement. What will you ask to draw out their concerns? Or, if they are ready for battle, how will you express understanding and redirect the conversation to their concerns?

- ▶ Who might be missing that has a high stake in the outcome?

If there are others affected, they should be involved. If not, agreements made around recommendations can become moot, either because they're overruled later, or because it will be difficult to obtain support from someone who is not a party to the agreements.

- ▶ How can you ask for feedback on how the process is going?

Checking the "temperature" of the group is valuable throughout the conversation. You're not inquiring about the meeting content, but about the process facilitation. For particularly contentious meetings, you could include many checks along the way.

EXAMPLES

"How do you feel about what we've covered so far?" "Do we feel we're ready to move to the next discussion point?" "Before we continue, tell me how this process is working for you."

Tips for Conducting a Successful Recommendations Meeting

To ensure a successful recommendations meeting, structure your meeting in the following way and follow the outlined tips!

- ▶ Restate the original contract.

Review key elements from your original project contract or statement of work. What is the business problem you are tackling? What did stakeholders agree that you would perform with your analysis?

► Provide the meeting structure.

Share the agenda for the meeting, the sequencing of the conversation and the timing.

► Present analysis.

Share the results of your analysis. Where necessary, reference the sources of key findings.

► Ask for reactions to the analysis.

Allow sufficient time for stakeholders to react to your analysis and for you to respond to questions. Facilitating acceptance of the analysis findings is a crucial part of the meeting. If stakeholders do not agree with your conclusions, they will not agree with recommendations based on your findings.

PRO TIP

If you cannot reach agreement on your analysis findings, you may need to pause your process here and facilitate agreement on the best way to proceed. This could include performing additional review of the findings, expanding your analysis or bringing in a credible external resource to validate the analysis.

► Present recommendations.

Share your recommendations and identify how they will address the business problem. What resources will be required? What results do you expect? If you have more than one possible recommendation, share how the alternate recommendations differ in terms of resources, processes and anticipated results.

► Ask for reactions to the recommendations.

Allow sufficient time for stakeholders to react to your recommendations and for you to respond to questions. Again, you will need to facilitate acceptance and approval of a recommendation.

PRO TIP

In some instances, you will not reach agreement to proceed with a recommendation during the meeting. Be prepared to offer alternative next steps and facilitate agreement on these. Possibilities could include additional review of available resources or timeline adjustments.

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