

# Consultative Joint Problem Solving

A Shared Consultant/Client Approach



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The concept of joint problem solving and partnering within the workplace and within today's business interactions is gaining an ever-increasing focus today. Both internal and external parties control resources that can best be utilized/implemented through the application of a partnering mentality. While possessing a greater depth of knowledge in consulting skills is an advantage to more proactively partnering with internal/external customers, understanding the joint problem solving approach and its nuances is just as, if not more, advantageous to this desired outcome.

Joint problem solving (JPS) is a cooperative approach that is focused on both parties optimizing their outcomes and growing and maintaining a long-term relationship. The consultant can bring a considerable amount of skill and knowledge to the table, but unless s/he is seen as someone with whom the client wants to conduct business, it very likely will result in a one-off engagement. Within JPS, a skilled consultant must possess communication, interactive management, and sales process skills and use them continuously throughout the consultative engagement. These JPS skills are spread out over three key timeframes of any engagement—prior to the initial face-to-face meeting, during the meeting, and in post meeting reviews—a consultant must be skilled across all activities to be successful.

To successfully achieve a strong consultant/client relationship requires a re-examination of the resources the consultant controls and the client's perception of those resources. Consultants bring not only products and formal services, but also the effort, experience, ability and skill that can help solve a problem and/or meet an opportunity. Consultants are a primary resource and need to be viewed as such by the client, or potential client.

The importance of a resource is dependent upon the perception of the resource by the client. If they see value in the consultant, the consultant very likely becomes the “figure” in the client's perception and stands out against the

“ground” of the potential products and services. Conversely, if the consultant is seen as simply a deliverer of goods and services, they become part of the “ground” and will not likely be seen as a problem solver. If a consultant is not seen as possessing some resource which the client desires, they will not enter into expanded business with the consultant and those skills in developing joint problem solving scenarios with a focused impact on improvement will go unrealized. The consultant’s focus is one of knowing the business, knowing the client, and knowing the business issues that each particular client is facing—these all help create trust and credibility, and ultimately, value. This knowledge base places the consultant strongly into the “figure” mode for their clients—the position a consultant must attain for a successful relationship to evolve and grow.

It is unfortunate that many client relationships do not begin with a ready acceptance of the consultant’s value. Indeed, an increasingly competitive environment breeds even more skeptics who question if consultants are even a desired resource. In many cases, the consultant creates these feelings as they pursue the wrong client, use the wrong approach, or pursue the right client but at an incorrect point of entry.

The professional, and most persuasive, way to develop the perception of a consultant’s value is to demonstrate capabilities and their value to the client. The consultant does this by helping the client focus on real problems, explore solutions, and assist in making the best corrective/preventative decision. The behavioral skills exercised by the consultant must be strongly focused on seeking information and testing understanding (clarity). In their drive for success, consultants must also understand the process of how their client makes decisions. Such knowledge assists the consultant in influencing the client’s decision making process and focuses it more intently on the perception of created value from the consultant’s inputs.

## The Decision Making Process

There are many models of decision making, from simple to complex; for our purposes, a more simplistic approach will suffice. It begins with the client’s perception of the situation, both present and future. Does s/he see the situation as stable, shrinking, growing, or explosive? Is everything on target or are there some concerns or problems? Is the future just going to happen or are there steps that should, or should not, be taken to improve it?

From the perception of the situation evolve concerns or problems that may be vague, ambiguous, or otherwise out-of-focus. If any action is to follow, the stage of identifying the problem must occur. Here the key problem(s) or opportunities must be clearly identified and evaluated. Here also, the problem is given weight; that is, the importance of the problem is judged, as well as the value of having a solution for it.

The next two stages may occur simultaneously, or in either order, but they will occur. One is called preference ranking, where the decision maker explores his/her preferences in shaping a solution. For example, once I have decided to buy a car, I start prioritizing my preferences: cost versus resale value, safety versus cost, color versus availability, convertible versus hard top, and so on. Preference ranking is a critical phase of decision making which will determine the comparative desirability of alternative solutions.

The other event, which may intermingle with preference ranking, is the exploration of alternatives. Here the decision maker attempts to identify and evaluate optional solutions. It may be noted that current research indicates this action to frequently be very superficial if one desirable solution has already been identified.

Making the decision is such an obvious action it has been overplayed in the literature and most training programs. Sales professionals who have mastered numerous ways to “close” may be shocked to learn that current research shows a negative relationship between “closing attempts” and actual sales. In fact, the act of making a decision is an outgrowth of the earlier phases and is almost completely dependent upon them. The term “almost” is used because the next phase may also affect the decision and its implementation.

After a major decision has been made, two events occur. One is a period of remorse, or self-doubt, questioning whether the decision was the correct one. The other event is a realization of contingencies, the new problems that will be caused by solving the original one. After I have purchased my new car, I now have to notify my insurance company, get it registered, follow a break-in period, anticipate possible minor flaws and defects, make payments, etc. Remorse and realization of consequences feed on each other, creating at least a period of discomfort and, at most, a decision to cancel the decision causing the discomfort.

To summarize this approach to decision making, there are six major stages that the consultant and client need to help each other achieve. These are:

- Perception of the situation
- Identification of the problem
- Preference ranking
- Exploration for alternatives
- Making the decision
- Remorse and realization of contingencies

All of these stages contribute to establishing the common ground and control of a valued resource necessary to enter into a true joint problem solving relationship. The specific objectives for this relate to the stages of decision making that the consultant wishes to influence. Briefly stated, they are:

- Understand the client’s perception of the situation
- Distinguish real problems/opportunities from concerns
- Help the client focus on key problems/opportunities and assess their importance
- Assist the client in seeing the value of solving the problem or taking the opportunity
- If desirable, work with the client in reformulating their preference rankings
- Help the client expand creative exploration for seeking alternatives
- Assist the client through the remorse period by helping them face and resolve contingencies for implementation

Meeting these objectives will also meet the six major stages and define the skilled consultant.

## Basic Problem Identification Strategy (BPIS)

The BPIS addresses the first four of the specific objectives and applies generally to the first two stages of decision making—perception of the situation and identification of the problem. As an influence strategy, BPIS was discovered, not created. Behavioral research of influence situations revealed that skilled persuaders use a common strategy of questioning. Four types of questions are used; each designed to meet a specific objective.

*Background Questions* reveal the client's perception of the situation

*Problem Questions* uncover concerns, needs and opportunities

*Implication Questions* uncover relationships among problems and their importance

*Solution Questions* explore the benefits of solving the problem(s)

BPIS is rational and roughly chronological. The starting point is gaining an understanding of the present situation. From this background information should come areas of concern, which are clarified with Problem Questions. The importance and interrelationships of the problems are developed with Implication Questions. The attractiveness of solving the problem is explored with Solution Questions.

While this is a simplistic view of BPIS, the value of the questioning strategy must be clearly understood. The reasons why questions are more persuasive than giving information include three powerful points. First, questions are interactive; both parties are involved in the entire process. Second, answering questions brings the points, and their emotional weight, to the forefront (they become “figure”); I can passively agree with your information, but I must actively think to answer your questions. Finally, questions ensure the accuracy (at least that perceived by the responder) of the information; providing information is more risky since you lose credibility with incorrect assumptions or information seen as irrelevant. The power of asking questions is well documented and BPIS merely directs those questions to specific objectives.

## Preference Ranking Questions

To determine the ranking of preferences associated with a solution, skilled persuaders/consultants use value and comparative questions. Value questions directly probe for the importance of preference elements (e.g., How important is it that the car be a convertible?). Comparative questions seek the relative importance of two or more elements (e.g., Is it more important to have the car this week or to have it equipped with the CD player?). Used together, these two question types help both the consultant and the client judge possible solutions against their own internal preference ranking. The information gleaned from this process will indicate the feasibility of attempting to reformulate the preference ranking.

## Contingency Analysis

A long established view in sales training has been that after the agreement is signed, get out—don't risk unselling. While this suggestion may hold true for some situations, it is not good advice to follow when dealing with major decisions in a consultative joint problem solving situation. In these cases, it is best to stick around for the realization of contingencies and remorse periods. Contingent problems will arise, and remorse is almost a given. If the consultant is not available and helping in facing these discomforting experiences, somebody else probably will be. And, that somebody else may not be sympathetic to the mutual decision—the possibility of a third party increasing remorse cannot be overlooked.

The strategy for contingency analysis is to help the client recognize contingent problems and deal with them in a joint problem solving mode. Sharing the pressure helps to relieve it, and who is better qualified to help deal with contingent problems than the consultant who helped solve the original one? Rebuilding of resolve may be necessary here and call for more testing understanding around the importance of the original problem and the value of the proposed solution. A re-examination of preference rankings, and/or alternative solutions may be desirable to reduce remorse and provide reassurance that the decision was well made. Don't let the benefits of the original decision fade into the "ground".

Research on neophyte consultants and sales forces reveals that a major problem is simply offering too much information. One firm has even posted a notice that states: "Even a fish wouldn't get into trouble if it kept its mouth shut!" Psychologically, it is difficult to reduce a behavior such as giving too much information, so it is more effective to concentrate on increasing incompatible behaviors to giving information—questioning and testing information for example.

## Summary

Successfully filling a consultative role in joint problem solving requires:

1. Understanding the decision making process
2. Formulating a strategy to assist and influence that process
3. Selecting and applying the appropriate influence tactics to effect the strategy

This overall process, skillfully applied, develops into a joint problem solving relationship as the client perceives increased consultative value of the resources of the consultant. The consultative joint problem solving skills become an additional, and valued, resource in the relationship building process—both externally and internally.

The client wants a consultant who has business expertise, a dedication to them as a customer, sensitivity to their needs, and a willingness to provide guidance for the sake of the relationship. Using the above skills, in conjunction with the joint problem solving approach, will help in achieving these client-oriented expectations.

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### About BTS:

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