

**PETER BLOCK**

**FLAWLESS**

**CONSULTING**

A GUIDE TO GETTING  
YOUR EXPERTISE USED

THIRD EDITION





*“Flawless Consulting* is not just a practical, useful, and inviting book for practitioners. It’s all those things, but it’s also a book about some of the most vexing issues we face when consulting to organizations—issues of resistance, truth, doubt, vulnerability, and accountability. If you find yourself giving advice to people making choices, then this book is a must-have for you. Buy it today, use it tomorrow.”

**Jim Kouzes**, award-winning coauthor of the best-selling *The Leadership Challenge* and *The Truth About Leadership*; Dean’s Executive Professor of Leadership, Leavey School of Business, Santa Clara University

“Consulting at its best is about action and interaction, relationships and results. In a highly readable guide that is both inspirational and practical, Peter Block leads consultant and client together through a proven approach to realize their future.”

**Samuel R. Strickland**, chief financial and administrative officer, Booz Allen Hamilton

“. . . surpasses the high standards of relevance, clarity, and wisdom characteristic of previous versions. . . . Whether one’s consulting experience spans five years or fifty, there is a great deal in this new edition to prompt us to reflect upon our own practice and to discuss with colleagues.”

**Roger Harrison**, independent consultant and author of *Consultant’s Journey: A Dance of Work and Spirit* and *The Collected Papers of Roger Harrison*

“Peter Block has written a masterful third edition of his masterpiece, *Flawless Consulting*. A powerful message that emerged gradually in editions one and two comes clearly to the surface in this latest edition. Important additions to edition three are the strength-based strategies that many are beginning to use . . . in solving seemingly intractable problems in health care and other industries. They are featured in a new Chapter Twelve and form a common thread that runs through this entire path-breaking book.”

**Jon C. Lloyd, MD, FACS**, senior associate, Positive Deviance Initiative; clinical advisor, Plexus Institute

“. . . shows why the earlier versions of the book are deeply valued by those who have read them. The updates in this edition . . . showcase the premises of the book. *Flawless Consulting* is at the head of the class for those wanting to master the complexities of consultation.”

**Larry Browning**, professor, Department of Communication Studies, University of Texas at Austin; adjunct professor of management, Bodø Graduate School of Business, Bodø, Norway

“My company uses this book as our primary guide to consultant skills. Interestingly, our most experienced consultants value the insights from *Flawless Consulting* the most. It has made a big difference in how we think about and work with clients.”

**Tønnes Ingebrigtsen**, CEO, mnemonic

“Every new story and fresh insight in this third edition of *Flawless Consulting* abounds with sagely wisdom for anyone learning the art of influence without power. With the warm, gentle voice of a trusted friend, Peter guides, nudges, and inspires.”

**Arvinder S. Dhesi**, group talent director, Aviva

“This new edition of *Flawless Consulting* is highly germane to educators at all levels who are serious about helping bring about true educational reform. Teachers and students can drop their roles and engage one another authentically with discovery and dialogue about mutual expectations. Peter also helps us restore a sense of sanity in following what we know makes sense. I highly recommend this new edition for my colleagues in the education profession.”

**David W. Cox**, professor of education, Arkansas State University

“Peter Block did it again! With this edition of *Flawless Consulting* he demonstrates why he continues to inspire millions of change leaders around the world. We practice with more impact because of Peter’s teachings.”

**Louise van Rhyen**, change activist and nation builder, South Africa

“. . . very special as it has equipped me to be an enabler of transformation by making our clients and us work like real partners that build the capacity of both to work for the well-being of all stakeholders.”

**Anil Sachdev**, founder and CEO of Grow Talent Company and the School of Inspired Leadership, Gurgaon, India

“Peter Block’s masterpiece *Flawless Consulting* in 1980 informed my point of view on developing organizations. This book is the capstone—you can’t afford not to read it.”

**Phil Harkins**, CEO, Linkage Inc.

“. . . invaluable insights to the evolution and usefulness of *Flawless Consulting*. In this practical guide, one thing that stands out for me is Peter’s emphasis on the importance of consulting from the view of possibilities over problems.”

**Marcia Mendes-d’Abreu**, vice president, Human Resources, Ontario Teachers’ Pension Plan

# **FLAWLESS CONSULTING**

The Instructor's Manual for the third edition of  
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THIRD EDITION

# FLAWLESS CONSULTING

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EXPERTISE USED

**PETER BLOCK**

Illustrated by Janis Nowlan

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*To Dorothy, with love . . .*

## ALSO BY PETER BLOCK

*The Abundant Community: Awakening the Power of Families and Neighborhoods*, coauthored with John McKnight

*Community: The Structure of Belonging*

*The Answer to How Is Yes: Acting on What Matters*

*The Flawless Consulting Fieldbook & Companion: A Guide to Understanding Your Expertise*, with Andrea Markowitz and others

*Freedom and Accountability at Work: Applying Philosophic Insight to the Real World*, coauthored with Peter Koestenbaum

*Stewardship: Choosing Service over Self-Interest*

*The Empowered Manager: Positive Political Skills at Work*

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The last time I revised this book was in 1999 when we were millennium-minded. On the one hand, we feared business would be shutting down because the computer world was going to abort and refuse to grow one year older. On the other side was the belief that the new millennium would mark the beginning of a new consciousness for peace and well-being.

Well, neither really happened. Our dependency on computers and technology has only intensified, and a decade into the millennium, we are at war, still addicted to fossil fuels, and concerned whether the economic system we have grown used to is still relevant. This means that living with a vulnerable present and an uncertain future is going to be a permanent condition.

This situation bodes well for the world of consulting. The more complexity, confusion, and uncertainty in our lives, the more we realize we cannot go it alone or keep doing what we have been doing. The demand for help and advice should keep growing.

The profound uncertainty of our lives, both personally and at work, also results in more and more people functioning in a consultative stance. The essence of this stance is that of wanting to have influence when you do not have direct control. This challenge is true not just for consultants; it is true for people who used to be in charge: bosses,

teachers, preachers, doctors, sergeants, mayors, and, not least of all, parents. Permanent vulnerability and uncertainty demand a level of relatedness based on listening, authenticity, and not knowing. This is what makes command-and-control behavior increasingly obsolete. Not all of us get this, but sooner or later, we are going to develop our capacity for deeper relatedness and partnership or we will be looking for a new job sooner than our careful planning might have indicated.



In response to the wider need for a consultative stance, I have added in this edition two examples of how consulting skills can be useful, actually transformative, in a broader context than strictly for people in a support or consulting role. I have picked two sectors of society where the call for change and reform has been shouting in our ears for decades with little to show for it: health care and education. These are also service industries, which is where most of us work these days.

Both of these fields are in the throes of the language of reform. But most reform efforts are more about improvement rather than rethinking something more fundamental. The health care “reform” is

mostly about cost control, who pays, and increasing the pressure on standardization. There is no reform in that conversation, just better or different management. Real reform in health care will come from changing our relationship with our service provider and having service providers change their relationship with each other. In consulting terms, we need more balanced contracting, more joint discovery, and a new dialogue. This is starting to occur, and Chapter Twelve presents a great example from a very special surgeon, Paul Uhlig.

Like health care, the current conversation about education reform is also not reform; it is just more controls and imposed standards masquerading as reform. True reform will shift our thinking about the culture of the classroom, accountability of the learner, and the relationship between teacher and student. An example of this from an amazing high school teacher, Ward Mailliard, is in Chapter Eighteen.

Looking at the face of reform in these two arenas gives us clues on ways to achieve changes for leadership in other areas, such as business, government, religion, and human services.

In addition to living with permanent uncertainty, we are living increasingly virtual lives. Many of our relationships are long distance. We are part of virtual teams spread too far to ever be in the same room together. We are more and more dependent on electronic interaction. We speak to friends by writing on an electronic wall, and we substitute webinars for seminars. Soon we will be able to hold all our conversations, be entertained, find a life partner, and visually be with our family all on a handheld device.

Despite the growth of the virtual world, our days are still occasionally populated with live human beings and when we are in the room with others, we need to get to the point and make the most of it. Playing roles, being vague, speaking in generalities, and getting to the point in the last five minutes waste the uniqueness of having all our senses available when we are face-to-face. We want to take advantage of real meetings to become personally connected in ways powerful enough to overcome the distancing and isolating effects inherent in an electronic connection. Thus, the need for authenticity and directness about sensitive issues outlined in this book increases. There is a discussion in

Chapter Six about ways to make virtual relationships as useful as possible. If you do not want to read that far, text me and I will compress it and send to your drop box, assuming you give me the key.

Another revision in this edition is in the chapters on the feedback phase and on implementation. Giving feedback is part of every consulting or support effort, but almost every meeting is one where ideas or analyses are presented with the intent of improving or shifting a person's or organization's strategy or operation. We still spend way too much time making our point, often our PowerPoint, without realizing that the purpose of most meetings is not to make a point, or express ideas, or to sell something but to move something forward. That is why I have broadened the idea of a feedback meeting to include any meeting that has the intent of producing action. The action does not move forward when one person is talking and a group of people are listening. It is dialogue, interaction, doubts, and commitments that move the action forward. This sounds so simple and remains so rare that I explore it in more detail in Chapters Fifteen and Seventeen.

One other addition relates to the shift occurring in the organizational world from a primary focus on needs and deficiencies to a focus on possibilities, gifts, and strengths. The belief is that more change occurs



when we focus on the future and our capacities rather than try to make sense of the past or even the present and look so much at problems and what is wrong. In Chapter Twelve, I give some examples of where this is occurring and offer some thoughts on what this means for consulting work.

## THE DESIGN OF THE BOOK

I am somewhat neurotic about meeting rooms—how they are arranged, the light, the color, the art, the movement: all the things that bring aliveness into our experience. In the same way, I believe the design of a book is as important as its content. Ideas should be accessible and written in everyday language. The pages should invite readers in with white space, large type for aging eyes, and images, in this case, drawings, to break up patterns and give the eye more places to go.

Along these lines, one of my concerns about the first revision was that the book became too thick. It was heavy to hold, hard to travel with, exhausting to contemplate finishing. Worried about this, I turned to the Internet to provide the vehicle to do something about it. In this edition, I have taken all the content that did not seem right to the point and moved it to the Flawless Consulting Web site: [www.flawlessconsulting.com](http://www.flawlessconsulting.com). Icons throughout the book guide you to expanded content that is relevant to the material you are reading. It also gives me a way to update ideas as they evolve. I hope this works. If it doesn't work for you or if you do not have access to the Internet, let me know, and I will provide more hard copy. If enough of you want more hard copy, I have got me another book, so that's not so bad either.

## WHAT IS STILL TRUE

What needs reaffirmation in this edition of the book is that teams and personal relationships are still critical to technical and business success. The value of teams and relationships is now more widely accepted than it was in the past, at least intellectually. We may not be

any better at working together, but at least we know it matters and want to create more cooperative workplaces, whether virtual or in person.

One reason the ideas in this book have endured is not so much that specific consulting skills are presented in such overconfident specificity; it is more because of the attention the book gives to the emotional and personal dimensions of our workplaces. Even now, with all the rhetoric given to relationships, personal development, and even spirituality, our institutions still operate as if strategy, structure, and technology are what really matter.

Relationships continue to be treated as a necessary inconvenience—as if they have to be endured and wherever there is an opportunity to automate a transaction or communicate electronically, we take it. In 2000 most telephone conversations involved a machine on one end; now it is text messages, e-mail, and, if I want to look personal, Facebook, LinkedIn, and their successors. These are often the media of choice. Even more, we encourage people to work at home, where human interaction is minimized in the name of serenity and a more balanced life.

What is difficult about managing relationships is that something is demanded of us that technology and automated routines do not require: the need to know ourselves and be authentic. Authenticity is simply being honest with ourselves and being direct and honest with others. For whatever the reason, authenticity continues to be rare in our workplaces. Most interactions carry an element of role play, positioning, and strategy. All are reflections of our wish to control our environment and the people in it.

In some ways, this book is a long and detailed description of the landscape of authenticity. What has stood the test of time is that this rare act is not only good for the soul but also works very well. “Authentic consultant” is not an oxymoron but a compelling competitive advantage, if, unfortunately, a rare one.

What is still difficult about authenticity is that it is a high-risk strategy. It swims upstream in a culture of control, which is where most

of our organizations remain. It also demands some faith in ourselves: we have to be tuned into the feeling dimension of our connection with others. Most of us have spent our days developing our brain and have left our body and its feeling parts behind, to be reclaimed after work hours. So even when we decide to risk being authentic, we might not know how.

Valuing the relationship between consultant and client, or teacher and student, or service provider and customer, and defining how to manage that relationship is where this book has found its niche. The intent of this revision is to deepen and expand that white space between strategy, structure, and technology that we label relationship.

*October 2010*

Peter Block  
Cincinnati, Ohio



## ACKNOWLEDGMENTS

It is a treat to have an opportunity to formally express appreciation to those who originally created the concepts expressed in this book.

Conceptually, the role of interpersonal skills in organizations and the key role that authentic behavior plays was pioneered by Chris Argyris. What I learned as a student of his in the now-famous 1960s is still powerful and relevant.

Most of us learn how to consult from watching someone who knows how to do it. I was lucky early in the game to follow around Barry Oshry, Roger Harrison, and Dick Walton. They are the best and gave support to me that was above and beyond the call of duty.

Tony Petrella, my partner in crime from the beginning, and Marv Weisbord have so deeply contributed to my understanding of consulting skills that I can't begin to separate my thoughts from theirs. I can only express appreciation for a valued partnership that has been enduring and priceless.

Neale Clapp contributed greatly in two ways. He has given unqualified support and friendship, and he recognized the value in the consulting skills workshop and theory long before I did. In conducting many of the early workshops, Neale contributed conceptually to the early sections of the book on the staff or support role and remains a close and dear friend.

The chapters on resistance were clarified by the late Jim Maselko. Through his skill and enthusiasm, Jim helped give life to the approaches to consulting that this book represents.

The first attempt at writing the original version of the book was done collaboratively with Mike Hill. Although the book eventually took a different direction, Mike was key to getting the thing started. His fingerprints remain in portions of the early part of the book.

The basic concepts on contracting are drawn from Gestalt psychology. These were crystallized in a workshop I attended run by Claire Reiker and Mike Reiker. Their ability to present them simply and powerfully was a great gift.

The drawings in the book are by Janis Nowlan. I sent her a very primitive form of the manuscript for the first edition to see whether she could enliven the copy with illustrations. I thought I had given her an impossible task. The drawings Janis sent back were incredible. Her light touch in visually expressing the concepts in many cases is much more perceptive than all the words I have put together. This is not surprising since she is a very experienced organizational development practitioner in her own right in addition to being an executive in higher education. Janis has continued to support this book with new illustrations and by updating some wording and creating a new wardrobe for the old ones. Thirty years later, her talent continues to grace the pages with new insights and creative talent.

Thanks go to Ray Bard, who was my publisher when the book was begun. Ray believed a book was possible when I thought all I had were some notes for a workshop participants workbook. Acquiring editor Matt Davis, with Jossey-Bass/Pfeiffer/Wiley, was very patient with me, and his support and encouragement directly led to this third edition.

Continuing thanks go to Phil Grosnick, Bill Brewer, and the affiliates of Designed Learning. They lead and bring to life the Flawless Consulting Skills Workshops we conduct around the world now. The bulk of this book documents the theory we have been presenting in the workshops. Most of the concepts have emerged as answers to questions from people learning about consulting. Thanks go as well to

the workshop participants for their patience when the concepts were confusing and to their willingness to help us articulate the consulting process out of their own experience.

As with the original edition, Leslie Stephen helped with the editing of this revision. This is the eighth book that she has helped edit with me. She supports my voice and gives structure, simple clarity, and deep understanding to whatever she touches. Thanks as always to Maggie Rogers, who makes everything happen. She is the best. Thanks also to Beverly Miller, who copyedited this edition, Paula Goldstein, who designed the interior, and Susan Geraghty, who managed the production of this edition.

My thinking on the power of conversation was always influenced by my connection with the late Joel Henning. We ran many workshops together and I miss him. The chapters on implementation in this edition were greatly influenced by my association with the Association for Quality and Participation's School for Managing and Leading Change. The school was the laboratory where the new ideas were tested. The thoughts about designing group experiences have been influenced by watching Jill Janov do her work so well. I am especially grateful to the late Kathie Dannemiller and her associates at Dannemiller-Tyson Associates. They understood something profound about the heartbeat of large assemblies. Also Dick Axelrod and Emily Axelrod have created magic in their work with The Conference Model. Dick has written his own books on engagement, and the material in this book grew out of many conversations with him that have changed my consciousness.

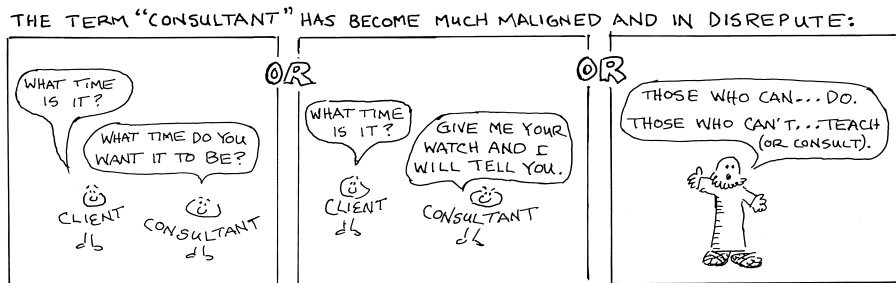
All of us who consult today owe a debt of gratitude to the work of Ed Schein. He was one of the early beacons of light who gave direction and insight to those of us who contemplated working in the field of organizational change. He made understandable and explicit the process consulting path that later became a central part of how I operate, and for that I am very grateful. Finally there are two new voices in this edition, Paul Uhlig and Ward Mailliard. They are great friends and enormous innovators in health care and education, respectively. I learn so much each time we are together.



# **FLAWLESS CONSULTING**



# A CONSULTANT BY ANY OTHER NAME . . .



ANY FORM OF HUMOR or sarcasm has some truth in it. The truth in the prevailing skepticism about consultants is that the traditional consultant has tended to act solely as an agent of management: assuming the manager's role in either performing highly technical activities that a manager cannot do or performing distasteful and boring activities that a manager does not want to do. The most dramatic examples of consultants' taking the place of managers is when they identify people who will be let go or functions that will be eliminated.

When you are asked directions and you tell someone to get off the bus two stops before you do, you are acting as a consultant. Every time you give advice to someone who is faced with a choice, you are consulting. When you don't have direct control over people and

yet want them to listen to you and heed your advice, you are face-to-face with the consultant's dilemma. For some of you, this may be your full-time predicament. Some of you may face it only occasionally, functioning part time as managers (having direct control) and part time as consultants (wanting to influence but lacking authority to control).

## SOME DEFINITIONS AND DISTINCTIONS

A *consultant* is a person in a position to have some influence over an individual, a group, or an organization but has no direct power to make changes or implement programs. A *manager* is someone who has direct responsibility over the action. The moment you take direct responsibility, you are acting as a manager.

Most people in staff or support roles in organizations are really consultants, even if they don't officially call themselves consultants. Support people function in any organization by planning, recommending, assisting, or advising in such matters as these:

- Human resources or personnel
- Financial analysis
- Auditing
- Systems analysis
- Market research
- Product design
- Long-range planning
- Organizational effectiveness
- Safety
- Training and development
- And many more