

Expanding Consultants' and Coaches' Digital Toolboxes to Provide Collaborative Client Experiences

Digital Frameworks that empower consultants and coaches to steer clients toward operational excellence



Context / Introduction

On the lookout for cutting-edge, digital Organization-Level Collaboration Tools to elevate the client experience? You're in the right place. Innovative Management Tools presents a suite of Conversation Frameworks™ honed over nearly 30 years, addressing 28 prevalent scenarios shaping a company's performance. While these frameworks address topics and challenges that don't typically land on the radar or focus of consultants and coaches—such as department-level or employee-level challenges—a specific group of the Conversation Frameworks aligns seamlessly with coaching and consulting services.

Embrace a New Era of Collaboration and Remote Change Management Tools

Our tools have evolved from traditional "cards on a wall" activities to digital versions using interactive whiteboards (Miro boards). The digital versions, called Conversation Frameworks, our new generation of the tools, were released in early 2023.



Common complaints about consultants from a client's point of view:

1. **Lack of Understanding:** Clients may complain that consultants don't fully understand their business, industry, or specific challenges. This can lead to ineffective recommendations and solutions.
2. **Overemphasis on Theory, Lack of Practicality:** Clients may feel that consultants focus too much on theoretical concepts and fail to provide actionable, practical solutions that can be implemented in the real world.
3. **Cost Concerns:** Complaints about consultants being too expensive or not providing sufficient value for the cost are common. Clients may feel that the return on investment (ROI) is not justified.

Common challenges from a consultant's point of view in getting more client engagements:

1. **Market Competition:** The consulting industry is highly competitive. Consultants may struggle to stand out among numerous competitors offering similar services, making it challenging to secure new clients.
2. **Building a Reputation:** Consultants often face the difficulty of building a strong reputation and establishing trust with potential clients. Lack of a proven track record can hinder their ability to attract new engagements.
3. **Adapting to Changing Client Needs:** Consultants need to stay abreast of industry trends and be adaptable to changing client needs. Failure to do so may result in a mismatch between their services and what clients are seeking.
4. **Balancing Specialization and Diversification:** Striking the right balance between specializing in a niche area and diversifying services to meet broader client demands is a common challenge. Over-specialization may limit opportunities, while too much diversification can dilute expertise.
5. **Economic Factors and Budget Constraints:** Economic downturns or budget constraints within client organizations can limit their capacity to engage consultants. Consultants may struggle to secure engagements during challenging economic conditions.

Strategic Conversation Frameworks for Coaches and Consultants



Embarking on the transformative journey of coaching and consulting requires strategic tools that resonate with the nuanced challenges of the client. The following 10 Conversation Frameworks serve as a beacon, finely tuned to align seamlessly with the offerings and focus areas of many coaches and consultants. Each framework encapsulates a unique approach, providing a tailored solution to empower your practice and elevate client engagements. Discover the essence of these core frameworks that promise not just solutions but a pathway to client operational excellence.

In addition to a short description of the framework, we also provide common and recurring scenarios and challenges that companies select as being present in their company, based on an on-going organizational challenges survey conducted by Innovative Management Tools.

1. DIFFERENTIATE: Unleash intentional isolation strategy development to help organizations carve a unique space, safeguarding them from competitive attacks.



- In the quest to divert market attention from competitors, organizations grapple with finding an unparalleled space in their offerings.
- Even if the organization possesses a unique edge today, competitors persistently seek to close the gap, demanding a revisitation of what makes them unique.
- Intentional isolation from the competition, fostering uniqueness, poses challenges that require careful consideration for the organization.

2. FOUNDATIONS: Navigate through this framework to gather key messages, text, and phrases, crafting impactful Vision, Mission, and Values statements.



- With no existing Vision, Mission, Values Statements, company owners find themselves at a loss on where to begin.
- Outdated statements, created in a bygone era, prompt the need for a refreshing update.
- Actions, policies, and decisions showcase a misalignment between current operations and the organization's core principles, signaling a need for realignment.

3. FRAMING: Define upcoming projects with precision by establishing objectives and success criteria before delving into topics like scope, approach, deliverables, investments, and resources.



- Important projects on the horizon demand a smooth and formalized approach for success.
- In projects where team members are unfamiliar, the Project Lead seeks to detail the Project Charter through collaborative efforts.
- Time-sensitive projects call for tight control and transparency, leaving no room for regrouping after initiation.

4. HAND-OFF: Build effective delegation skills in key employees by helping them learn a process that creates a seamless transition of tasks to others.



- Employees promoted to department supervisor roles may resist letting go of responsibilities from their previous positions.
- Expanded roles may demand leaders to handle double the workload without an equivalent increase in time.

5. HURDLES: Conduct a barrier analysis to assess obstacles between the current state and a future state, devising strategies for overcoming their barriers to progress.



- Projects or initiatives stuck in limbo hamper the company's progress towards its goals.
- Employee complaints about hindrances, roadblocks, or obstacles affecting productivity necessitate a proactive approach.

6. IDENTITY: Engage in organizational positioning to outline an internal guide for positioning and communication at the company level.



- Absence of a high-level company positioning document leads to diverse interpretations among management and employees.
- Confusion among employees and customers about the company's niche necessitates the development of a high-level positioning document.
- Multiple directions taken by products, services, and initiatives prompt the need for reconciliation into a cohesive company strategy and communication plan.

7. IMPACT: Employ a decision analysis activity to anticipate the organizational impact of the projects and initiatives you bring to the company before announcing firm decisions to the staff.



- Decisions made without considering their impact on those executing the work pose challenges.

- Past decisions by leadership members causing chaos highlight the importance of anticipating impact on people and processes.
- Complaints about past decisions increasing workload or causing confusion motivate the company to avoid similar issues in the future.

8. NAVIGATE: Undertake planning and preparation to consider six critical elements impacting the success of upcoming changes before pulling the trigger to go forward and “do something” fast.



- Realization that projects often hit "Pause" and regroup stems from insufficient initial planning in project initiatives.
- Misalignment among project or leadership team members prompts a need for clarity on how to advance upcoming projects or initiatives.
- Jumping into projects without adequate planning, relying on figuring things out over time, necessitates a new approach following recent project failures.

9. OVERVIEW: Conduct a high-level SWOT analysis with organizations or departments to identify critical strengths, weaknesses, opportunities, and threats efficiently – most sessions completed in less than two hours.



- Organizations without prior organizational SWOT analyses seek guidance on conducting this essential activity.
- Past SWOT analyses, while valuable, consume excessive leadership time, necessitating a more streamlined and efficient process.
- Periodic SWOT analyses yield detailed yet mundane results, highlighting the need for focused, actionable insights.

10. SYNCHRONIZE: Facilitate a guided self-assessment for leadership or departmental teams to gauge alignment in eight key areas.



- Recognition by the management team that certain areas need realignment with the overall company strategy prompts the need for synchronized efforts.
- A new direction or strategy requires senior management members to align cohesively as a team.
- Chaos in a department, stemming from rapid growth or a major reset, underscores the necessity to align departmental efforts with the company strategy.

“These are some very innovative yet practical approaches - I would say that is what differentiates these products from others I have seen. In my opinion, that is a big 'value add.'”

Linda Tillman, OD Professional and Independent Consultant, New York, New York

Addressing Challenges Through Conversation Frameworks:

1. **Lack of Understanding:** Clients may voice concerns about consultants not fully grasping their business intricacies. Conversation Frameworks offer a solution by emphasizing tools that allow a coach or consultant to “dig deep” into the client company, ensuring a profound understanding at the outset, bridging the comprehension gap.

2. **Overemphasis on Theory, Lack of Practicality:** To counter perceptions of consultants focusing too much on theory, the “what” Conversation Frameworks dig into on a challenge or topic with the intention of “how” to improve, change, or overcome the situation. Conversation Frameworks ensure that consultants not only provide theoretical concepts but also deliver actionable, practical solutions that can be implemented in the real world.
3. **Cost Concerns:** Complaints about consultants being too expensive can be mitigated by adopting Conversation Frameworks that are affordable, show high return, and deal with the areas that result in wasted costs: People, Process, and Planning. By showcasing a clear path to value and tangible results with the frameworks, consultants can address cost concerns and enhance the perceived return on investment (ROI).
4. **Market Competition:** Differentiating in a competitive market is a challenge for consultants. Being in the pioneer adoption phase of Conversation Frameworks, a coach or consulting firm can set themselves apart from the competition with a unique customer experience offering that adds high value to the client organization.
5. **Building a Reputation:** Establishing trust and a strong reputation is crucial for consultants. Building a practice and focus more on the “how” instead of the “what” builds a powerful reputation in the market.
6. **Balancing Specialization and Diversification:** Striking the right balance between specialization and diversification is essential. Enhancing and expanding a coaching or consulting practice’s offering in breadth and depth to find that balance to meet client needs is critical. Conversation Frameworks open the doors to that expansion, be it wide or deep.
7. **Economic Factors and Budget Constraints:** Economic downturns or budget constraints within client organizations can limit their capacity to engage consultants. Consultants may struggle to secure engagements during challenging economic conditions. Having the ability to focus on the most critical and recurring challenges by leveraging Conversation Frameworks where the pain is felt most, allows coaches and consultants to weather the storm of revenue ups and downs because they have an expanded set of offerings to meet every client budget and need.

In conclusion, Conversation Frameworks offer a comprehensive toolkit for consultants to not only understand and address common client complaints but also navigate their own challenges in securing engagements and building a successful practice.

FAQ on Coaches/Consultants and Conversation Frameworks



1. **How common are organizational-level challenges among companies, and what challenges should concern me as a Coach or Consultant?**

A: Understanding the prevalence of challenges is crucial. Based on our ongoing Organizational Challenges Survey, here are the percentages of companies identifying with specific scenarios cited previously in this document:

- | | |
|----------------------------------|-------------------------------------|
| • Intentional Isolation: 48.0% | • Organizational Positioning: 88.0% |
| • Vision, Mission, Values: 76.0% | • Decision Analysis: 88.0% |
| • Project Definition: 64.0% | • Planning and Preparation: 92.0% |
| • Delegation: 100.0% | • High-Level SWOT Analysis: 72.0% |
| • Barrier Analysis: 88.0% | • Directional Efficiency: 84.0% |

If you would like to have your client organization take the Organizational Challenges Survey, let's talk about how to make that happen.

2. How can a Coach or Consultant access a Conversation Framework?

A: The process is straightforward:

- Complete the online Organizational Challenges Survey (DIAGNOSE) for your Coaching or Consulting Practice to identify frameworks that best align to your current offering with clients or could open the door to expanded offerings with the new tools.
- Receive Facilitator training on the selected frameworks (typically two hours per framework) for up to five consultants per two-hour training.
- Obtain access codes post-training.
- Enjoy unlimited, lifetime usage of the frameworks.



3. What is the investment for the 10 Conversation Frameworks cited in this document, and how can it benefit my consulting firm?

A: Each Conversation Framework training is US\$960. Training in all 10 frameworks would be less than a US\$10,000 investment, easily recuperated through client billing in a matter of weeks or months, depending on your usage frequency and billing rates.

4. Are there any hidden charges for surveys, additional training, licensing fees, or subscriptions?

A: To know which Conversation Frameworks your internal consultants would find most helpful in their client engagements, the organizational challenges survey (DIAGNOSE) for up to 50 consultants costs a US\$7,500. Quick turnaround is ensured after all participants complete the survey so that you can get to the important work – helping clients overcome their most pressing, common, and recurring challenges. There are no annual subscriptions or licensing fees with our Conversation Frameworks. If more internal Facilitator training is needed (beyond the initial five people trained), then it is simply another US\$960 for the new group, per framework.

5. Can I have a Conversation Framework with my consulting firm's logo?

A: Absolutely. We offer a branding "white label" service, adapting frameworks to your consulting company's name.

6. What if I introduce Conversation Frameworks designed for departments and employees to my clients – those that don't fit into my service offering?

A: This is encouraged! Our "Fund Your Frameworks" Program lets you fund your own frameworks for internal and client use after receiving 20% of the referred client's purchase as a credit toward your purchases.



Fund Your Frameworks[®]
Program

7. Does Innovative Management Tools offer development services for moving our proprietary processes to the digital space?

A: Yes, with nearly 30 years of Instructional Design experience and developing interactive digital tools, we provide an "outsourced" Instructional Designer service, helping you transition non-digital frameworks at a cost-effective rate. Contact us for rates and details.

Who is Innovative Management Tools?

Established in 2003 and headquartered in Wisconsin, USA, Innovative Management Tools is dedicated to Change Management, Business Coaching, and Sales Training/Problem-Solving Sales techniques. With over 30 years in Training/Instructional Design, we've provided coaching, guidance, services, and tools to more than 50 companies worldwide, ranging from solopreneurs to more than 90,000 employees.



What is the History of Conversation Frameworks? I have never heard of them.



What started off as “cards on a wall” activities nearly 30 years ago have now been digitized into miro boards as a complete suite of over 2 Conversation Frameworks. These tools focus on overcoming common business challenges. Conducted in small groups, these facilitated sessions drive incremental changes with participant buy-in. These change management tools offer consultants and coaches new ways to engage with client organizations, guide changes with less resistance, build bridges connecting organizational strategies with department-level processes, and cultivate a fresh, engaging, inclusive, visual, and effective continuous improvement culture within the client's organization.

What value add-ons can Conversation Frameworks bring to a Coaching or Consulting Practice?

- Refresh and Update the consultant toolbox
- Expand engagements by addressing clients' department-level challenges
- Complement the “What to do” strategy sessions with “How to do it” tools
- Personalize Frameworks to Fit the Consultant's Needs
- Standardize the consultant experience across the practice
- Grow the change management offering
- Jumpstart Digital Delivery

What challenges are Coaches and Consultants facing that would bring them to consider Conversation Frameworks?

- The majority of their tools are not designed for a digital delivery model.
- They would like to jumpstart their remote delivery offering with new tools but don't want to develop for years to come or hire a full-time OD resource.
- Their practice needs a more consistent, systematized approach to change management that engages clients in new, collaborative, digital ways.
- Their practice is not equipped to go into the "How" with clients, impacting the depth and breadth of what they can offer.
- They would like to show a more company-branded experience to their clients with new tools.

For which "types" of Coach or Consultant are Conversation Frameworks a valid option to consider?

- Change Management Consultants
- Business Consultants
- Business Coaches
- Productivity Coaches
- HR Consultants
- Project Management Consultants
- Leadership Coaches/Consultants
- Fractional Leaders

Conclusion

Innovative Management Tools invites you to embark on a transformative journey with Conversation Frameworks, empowering consultants and coaches to navigate the complexities of organizational challenges. As you explore the vast potential of these strategic tools, tailored for a spectrum of scenarios, envision a future where both internal and client operational excellence is not just a goal but a tangible reality. Elevate your coaching or consulting practice, foster collaborative change, and embrace the power of Conversation Frameworks as your indispensable ally in driving meaningful, sustainable client transformations. Your path to a digital change management solution and client experience begins here.

Contact Information: Patrick Seaton pdseaton@innovativemanagementtools.com

LinkedIn: <https://www.linkedin.com/in/patrickseaton/>

