



# Ted Ward on the Consultant's Role and Task: An Interview<sup>1</sup>

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## Ted Ward

A group of people have already invested a lot of time and effort in thinking through a task, working on it, and have produced something in writing. When I can get hold of something in writing, I look for evidence that the document is something other than a superficial attempt to create a vague pie-in-the-sky response. I tend to be negative about easy answers and generalizations that are so big that you know they can't be achieved; and if they were achieved, you'd have to argue for quite a while as to whether or not they were worth achieving.

Vagueness always turns me off, but the *attempt* to be precise, the *attempt* to be clear causes me to ignore the document. Either I won't read it thoroughly or I'll read it quickly. I won't work with the document if it's too pat because all I can possibly do then is to challenge it over and over again which ultimately creates a perpetual adversarial relationship.

Instead I say, "I'd like to go back to where you started on this." I will do that, saying something like, "As I read your paper, I noticed that you faced this issue or this matter, and here's what seems to me you've done. Now why did you think that to be the important issue?" I literally back them out of their own document, out of their own process, and into an earlier stage and try to get it restarted. In other words, I raise questions that are not simply questions about challenges to what they've done. If I ask, "Why did you decide to do this or why did you suggest that?" what usually emerges is a kind of a rationale. Then I'm stuck with the problem of saying, "You really believe that? You really think that'll work?" which is literally to say, "Well, I don't think it will."

Or, the other possibility is to say directly, "I just don't think that'll work. You asked me to be blunt." Being blunt is one way to do it, but that tends to set up adversaries. Then, the people who invited you have to side with you, and find themselves in a situation where they're fighting their own colleagues. I think I've pretty well learned how to head it off, and one way to do that is to back up to the foundations underneath the task that they've performed, and literally try to get them to do it over again without having to say, "I don't like what you did." I just kind of pretend that what they've done didn't quite get through to me. What I want them to tell me is a little bit more about what lies behind it.

Often I will find that if a group has to duck an issue, or if they're feeling sheepish about having played down a certain kind of conclusion because they have to "play" to some of the powers-that-be in their organization—those they need to impress—then, you can sometimes get people to admit that what they've put on paper doesn't really reflect what they're thinking; and point out that what they're actually doing is avoiding rather than engaging in necessary issues. Then you have something positive

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<sup>1</sup> Ted Ward on the Consultant's Role and task. From a taped interview. In this interview, Ted describes what he did in a particular consulting situation conducted in September 1998.

going, and once people can be a little bit self-critical, then I don't have half as much fear of being critical myself.

What I can be more concrete about is how this particular consultation worked out because it was a fairly ordinary consultation. It was a consultation on the matter of creating a section or division, or some kind of subordinated enterprise, within the mission for the purpose of training. They have come to the point where all of their pre-field training is contracted to specialists who are allegedly good at doing that.

People seemed very enamored with the word "training" and, obviously, have been influenced by some training specialists from the business and industry sector. One of the characteristics of training from that sector showed through in the document created by this group. There was a presumption that the tasks to be done by various performers within the organization, in this case within the mission, are tasks that can be precisely defined, and for which a series of rather precise training experiences can be arranged. But you have to start with a "needs assessment." So it's basically the old-fashioned, so-called "modern" approach to industrial management training, where you first of all determine the job to be done, then you build a scheme through which you can spot the deficits, and look at the people currently doing the job, or consider the newcomers who will be assigned the job. That's the deficit-remediation model.

In this consultation, I named it the "deficit remediation model" from the start. I told them, "You're not going to get anywhere with an approach that presumes the task is to discover deficits." The big problem here is that your needs assessment is going to be contemporary. Nobody can do needs assessment on an unknown future, except state the need to be inventive, creative, alert, and so on—the obvious. And that's not the same thing that people try to do when they do a needs assessment. Rather, they try to get concrete about needs and deficits. So I threw that little piece in fairly early in the game just to say that I was not comfortable with an approach that presupposes as much crispness as their paper suggested.

I usually don't drop negatives on them until I can get some teeth into it, or until I've found a way to do it in a defusing, humorous way, so that I can say something like, "I wish all of our lives were as neat and clean as that." Then people start spelling out exactly what happened in the situation. In this case, the request was made about two days before the event for me to lay the groundwork. I fended that off and instead suggested that "Bruce" be the one to start off. After all, they had worked on the commission for a year getting this ready to move forward. "Bruce" demurred and said, "I don't think I should do that. It probably would be wise to get the chief executive to start us off." "Good," I said. "Now you're going to bring in your number one man on the committee?" I knew that their regional director was coming in from another city. Instead of the director, I suggested they ask the meeting coordinator to fill in the story about how the committee works, how the committee thinks. That would make it possible for me to engage the meeting coordinator on the level of what the committee is doing, and this will free them to speak and engage in questions. Then I'll be better able to engage the director on how he sees the future of the mission.

At the meeting I was silent at first, until the director began speaking. Then I began to get conversational with him. Without debating or arguing, I sought opportunities to say, "Tell me a little bit more about that," or "That sounds to me as if. . ." or "That sounds a lot like a situation I remember. . ." "Is the sort of thing you're talking about?" I had no idea how amenable the group was going to be to any really heavy suggestion.

I had two heavy suggestions that I wanted to make somehow, so I did have an agenda, yes. One was that they were starting too big. Somehow I thought they had to face that factor. The second thing was that their notion of training was a school-type notion, even though they were going to do workshops and bring in specialists to deliver experiences and training. I sensed that this was a reservation of the director's as well. That turned out to be an absolutely wrong cue. That was not his position at all. It was a misread. And if I had played to that, I would have ended up looking like I was arguing with him! I have learned that sometimes people inside an organization misread each other severely enough that if you come in with an agenda that you expose too early, you don't know who the players are, and where they are in their thinking. Even if you have picked up on the main themes or issues, pre-setting your agenda can get you in trouble. You are better not to have a working agenda but instead a very loose one. The director and meeting coordinator then made it very clear what the purpose of the meeting was, what they wanted to achieve. I had asked for that. "Whatever you guys do, make sure you make it *their job* to say what today's meeting is supposed to produce." In this way, I didn't have to say all that myself.

Then we let the group spin out their perceptions of the situation. By becoming a kind of interactor, without strong affirmations or with no particular voice of criticism, I was then into the scene without having to do the two things I prefer not to do:

1. Be the person who sets the initiatives. As a consultant, setting the initiative, I usually set them in the wrong direction or end up in the wrong place. It's much more important to go back to the starting point as perceived by significant sets of people. I can't go into that group and say, "I think you ought to start here," or, "Here's the agenda with the things you should think about."

2. Give any clues about negative concerns until I've found things to be very positive about. I try to be positive to both or 3-4 of the factions, within the first hour, so that it is clear that what we are trying to do is to draw from all, and to pull the good out from wherever we find it. I am resistant to taking a stand with certain people. However, by the end of the day, I was taking a stand. I even nominated the person who could be the director for the project! and got the biggest smiles because I had leapt into a private meeting. I suggested the appointment of a 2-year interim director, chosen in-house, but this was only offered two-thirds of the way through the meeting. It was a high concern on the agenda: By the end of the day they wanted to know who they should nominate. I was concerned, because I figured they would look to me to suggest outside names as possible nominees, and in a mission organization, outsiders are not the best choice. You're better off choosing an insider and developing them. Why?

First, missionary organizations or agencies tend to be controlled by the longer-term people, even if it's a group with many short-termers. Even after 4-5 years, short-termers have no status. You really have to earn status. If an outsider comes in to assume an executive role, leadership role, or with an overarching responsibility such as director of training, he or she might be the world's finest person, but still be an outsider. The trick is to recognize strengths where you find them.

Another thing. These people are fairly bright. They don't make many mistakes and mess things up nearly as much as other organizations do. They're a good bunch. I knew this. So I presumed they had some good, insider understandings deserving of being identified as part of this training enterprise agenda. Again, going back to the notion about where you get your agenda for training. If you're getting it from a trained outsider who has performed a needs assessment, or from some other kind of spelling out of purposes and goals, it presumes some kind of standard product, an interchangeable parts notion of training, a kind of industrial revolution notion of what you think you need. But every

field is different culturally. Therefore, if you're concerned about training in fields, you're concerned about training principles. But, the specifics will be unique. The main concern of this mission is church planting. They recognized that church planting was vastly different from culture to culture; but when they discussed training, they assumed similar kinds of training for church planting.

As I began to get involved, I interjected remarks such as, "Have you accommodated enough to the contrast in these fields?" This is less critical question to get them thinking about something they need to think about more carefully. At some point I would raise concerns I had around their agenda of issues—if I felt that I had read them right. Again, this is one reason why I don't want to do this too early. Quite often something I thought was an issue, isn't an issue. Going into the meeting, I have my paper marked. I look for codes, symbols, key words. I might think something is an issue, but in looking over my notes, I'll see how I've read into something that isn't there, while I'll spot other things that I didn't initially see.

It's the task of the consultant to hold loosely to one's own agenda and to be very sensitive to adding to the agenda as needed; especially if concerns from the group coincide with your own concerns. The consultant's agenda must coincide with the insiders' agenda. "That's a great idea, concept, proposal, etc." "I'm glad you put that together, I wondered about that . . ." "I was reading your paper and. . ." What I'm doing here is getting to the heavy part, to the point I wanted to make, but I had to ease into it, or try to guide them toward a conclusion: "I'm glad you said it and not me." Then I listen closely to see if they have touched all the bases, even though they usually have the main points down. If I have to I say something like, "If that true—then this is also a problem." Or, "Here is something else to think about."

It's about that time that I start doing some storytelling, referring to other experiences, situations, groups, and the like, that illustrate what happens when a problem like this one occurs, and what happens when the kind of problem they're talking about is not dealt with well. I rarely tell stories about what this other group did to solve the problem; so at this point, I *don't* tell them, "And here's how you solve your problems." I might say something to the effect that "You're walking into a similar problem," but I try to couch it in such a way to make them feel that others had bigger problems than they have, and that there is hope for their situation. I don't want to give them solutions either. I try to adapt a positive approach in my storytelling.

Occasionally, I may have to be more confrontational: "Do you know what I'm hearing in what you're saying?" In this organization, as an outsider, I could have addressed my comments to any one of the insiders, but the only stake they really had in the situation was to placate the president. I watched the way he behaved, how he paid attention to me, and how engaging and very accepting he was. I had not said anything really overt, had little interchange with him, but then I started sitting around him, and so it was almost in the context of a little piece of friendly advice that I could almost chide, "You don't really think that. You're capable of better than that. You know better." Sure enough. He began to self-critique his presuppositions. Then I said to him, "I wanted you to tell us more of your own view in what you just said." I accepted the possibility that he would see himself being set up as a straw man. He saw this and didn't feel obligated to defend his position. In fact, he attacked it! It wasn't an argument between him and me. My softer, joke technique opened up the way for him to self-critique, and he was definitely not the kind of person people kidded with.

In the consultation with the mission organization, ultimately I spelled out the issues. And the presuppositions I had made in advance came out. I said, "Let me make a little speech here." At the

halfway point and around the table, I made my 20-minute speech. I explained that I might have telegraphed my own bias, but that they still needed to make their own decision. But I said they had to get serious about key pieces: serious about choosing Mode A or Mode B. They had to get serious about taking the next steps. I explained that I thought their next step involved making a tough-minded decision: “Do you want a flexible, responsive approach, or a propositional approach? You can defend either one; both have their good points and liabilities.” My recommendation was for them to decide, make the tough decision, and then decide whether to go big or small.

At that point I asked them if they had any kind of documentation of successful or unsuccessful experiences. “You just aren’t in the habit of trying to capture your experiences. Learn from these. Some of those people are you and you don’t have enough respect for yourselves to say you’re learning something. When you say you don’t know anything about training, what you’re really saying is that I haven’t been trained to do training.” Do you have the qualifications? Of course!” The next big issue is: “Are you willing to try to find ways to mobilize your own processes of learning so that you’re not being controlled by the document.” In the document the word “training” appeared an elaborate number of times.

After lunch, the director instigated a quick survey of which side individuals would choose: Mode A or Mode B. After the responses, I asked them to give one or two examples of where they might start and where they might set up a mobile center. “Of those sites you talked about where to do you have some people who could be diverted from about 50-60% of their load?” Then I was able to recommend some people who could direct the centers.

“I could have sent them away for 30 minutes so that I could write the proposal for them.” Instead I invited them to bring the knowledge of their own experiences into the process and to give me feedback and ideas.