The Process Consultant

The role of the Lean Enterprise Continuous Improvement (CI) Manager and/or process consultant is a crucial enabler of process improvement. The CI Manager applies the skills of process consulting to lead the learning and change within an organization. As more than a project manager, the process consultant provides the leadership that builds commitment and understanding required to accomplish the improvement goals for the organization. The process consultant must live the Lean Enterprise principles and techniques that focus on optimizing value through a fact-based decision process.

A process consultant’s key role is to oversee and direct process improvement teams to help them achieve business goals. The process consultant’s responsibility is to support constructive change from an improvement project’s conception and to transfer the ownership to the team leader as the project matures to implementation.

The process consultant’s view must always be aware of the enterprise-wide implications of the changes at the work-team level. Understanding the characteristics of changing toward a Lean Enterprise will allow thinking “two steps ahead” of the current focus of activity, and will assure that the overall value stream will realize the benefits of local improvements.

The primary objective for the process consultant is to provide the synergy for making breakthrough improvements possible. The process consultant acts as a catalyst for process owners and process improvement teams to achieve defined improvement objectives and specific goals. To accomplish this objective, the process consultant is an internal process improvement consultant and leader of change. He/she must understand, but be independent of the work processes to provide unbiased direction to executive and senior management, process improvement teams, and the organization overall. The process consultant must focus on the process of process improvement as well as the results.

The process consultant role is usually a full-time position with a specific job title, description, and grade level no lower than manager. Responsibilities and accountabilities are clearly stated in key job requirements and supported by immediate and senior management. Individuals selected for this role must have established credibility within the organization and have the authority to implement and sustain changes.

A formal selection and assessment process is recommended for process consultant candidates. Once selected, candidates often complete consultant training and may be certified as a process consultant.
The Process Consultant:

- Assists in the development of the process model process maps
- Assists in the identification and evaluation of processes
- Conducts division and/or business unit assessments
- Assists in setting the priorities of process improvement projects
- Ensures that process improvement objectives, specific goals, measures, and metrics are established
- Manages the team chartering process
- Ensures that an adequate project plan is developed
- Assists in the selection of team members
- Selects process improvement methodologies and tools
- Works with the team leaders to plan and lead improvement projects
- Works with the team leaders to involve executive management and stakeholders in improvement projects when necessary to eliminate barriers to team success
- Provides complementary skills to team leader
- Provides guidance and support to the team throughout the entire process improvement project
- Assists in determining when team closure will occur
- Assists in writing of “case study” documentation
- Provides guidance to sustain improvement changes
- Communicates key lessons learned and best practices from across divisional process improvement projects
- Stays up to date in the application of process improvement tools and techniques

Characteristics

- Proactive
- Focused and self-confident
- Objective
- Trustworthy
- Results-oriented
- Comfortable with problem-solving processes
- Comfortable with change
- Creative and values creativity in others
- Works easily with different personality types
- Able to see the “big picture” (visionary)
- Works comfortably with all levels of the organization (including executive management)
- Respected throughout the organization
- Comfortable as a leader/consultant
- Aware of the degree can influence and/or control
- Comfortable with conflict
- Continuous learner
- Customer focused
- Team player
- Self-starter

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Professional Experience

• Comprehensive business knowledge (organization structure, business functions, processes, procedures, objectives, goals, measures, metrics, internal self-assessment processes, etc.)
• Considered a leader in the organization (especially by management)
• Viewed as a change leader, role model, and coach by the organization
• Project leader experience
• Experience in successfully applying quality management, process improvement, and problem-solving tools and methodologies
• Experience in implementing and sustaining change/improvements (change champion)
• Team leadership experience
• Individual and team recognition/reward champion
• Experience in selecting and contracting with outside consultants
• Process management focused (versus “numbers” focused)

Required Skills

• Presentation and communication
• Effective listening
• Knowledge of process improvement principles and tools (selection, application, and training)
• Conflict management
• Decision-making and consensus building
• Establishing goals and objectives
• Meeting management skills
• Team development skills
• Consulting and coaching
• Creative problem-solving
• Assessment and analysis skills (team dynamics, processes, problems, etc.)
• Project management and event planning (including team/project chartering)
• Time management
• Group/team facilitation
• Resource planning, budgeting, and management
• Priority setting
• Data collection
• Process benchmarking
• Knowledge of adult training and learning theory
• Knowledge of course curriculum and training materials development
• Knowledge of personal style preferences (e.g., Meyers-Briggs, Six Thinking Hats, etc.)
Detail Process Consultant Skills

**Observation & Feedback** - The Process Consultant:

- Follows the model for effective interpersonal feedback.
- Provides accurate behavioral observations.
- Identifies sequences of behavior from the initiator to results.
- Identifies behavior without generalization or judgment.
- Clearly relates own reaction to the behavior.
- Avoids speculating about the motivation for the behavior.
- Avoids speculating about the reaction of others.
- Offers alternatives in a constructive way.
- Provides plausible reasons for the alternatives.
- Asks for a response on the usefulness of the feedback.
- Accurately restates or records (if charted) the participant's words.

**Process Consultant Role** - The Process Consultant:

- Clarifies own role and that of others in completing the task.
- Responds more to process concerns than to content concerns.
- Looks for an approach to finding an answer rather than providing an answer.
- Clearly communicates the character of a process or tool proposed and explains how it will help.
- Encourages the use of a process perspective to move the group forward.
- Gets group participation to encourage full information disclosure and buy-in.
- Makes sure that unresolved issues are dealt with in some way.

**Facilitating Decisions** - The Process Consultant:

- Assures the clarity of the decision criteria and objectives.
- Clarifies the expectation of the participants' role in the decision.
- Prevents premature closure on the decision.
- Assures that the information needed for the decision is complete.
- Assures that all reasonable options are fully considered.
- Checks to see whether the decision was a product of the group, one or two team members, or the team leader.
- Makes sure that the outcome is clear and that the participants agree.
**Managing Conflict** - The Process Consultant:

-Recognizes and responds to conflict as potentially useful.
- Takes action to prevent or control destructive confrontation.
- Diffuses attempts by others to dominate or overpower.
- Uses nonverbal behavior to control the interaction.
- Helps the group to clarify areas of agreement and difference.
- Prevents premature closure on a decision as avoidance of conflict.
- Acts to make different views an opportunity to produce a creative alternative.
- Focuses on the purpose and objective of the task.
- Checks for closure on any confrontation.

**Planning & Organizing** - The Process Consultant:

- Demonstrates the application of information that is appropriate to the task.
- Provides clear measurable outcomes or deliverables.
- Gives evidence of a plan or organized strategy to achieve the outcome.
- Provides a methodology or tool to execute the strategy.
- Accesses the resources required for the task.
- Defines responsibility and timing for task completion.
- Evaluates progress or completion of the task.

**Contracting** - The Process Consultant:

- Observes and responds to the data that is immediately available.
- Explores the motivation for the proposed action.
- Sets conditions for the relationship.
- Assesses the customer's perceived needs and priorities.
- Checks for ownership, accountability, and control of the process in consideration.
- Tests for the scope and boundaries of the proposed task.
- Helps to clarify expectations and deliverables.
- Assesses the level of time, people, and funding commitment.
- Clarifies own role in the task and identifies limits of own commitment.
- Provides information and behaves in a way that instills confidence with the customer.