

CRAFT OF CONSULTING PODCAST

EPISODE 34: How to Help Client Teams Become Healthy and Functional—with Jan West

Deb Zahn: Hi, I want to welcome you to episode 34 of the Craft of Consulting podcast. My guest today is Jan West. She is a consultant and coach for organizations and companies particularly related to executive leadership and team building. As a trained psychologist, she has a lot of really tremendous insight in how you get leadership and teams to function as highly as possible. And it's actually that last piece that we're going to talk about today, which is how you get teams to function well so they can actually achieve what they're trying to achieve, and how does culture play into that within an organization again, so the organization can be successful?

And as a consultant, these are essential things to understand because invariably we work with leaders, invariably we work with teams and we need them to be functioning as highly as possible. And part of what our job is to know how to get them to end up working well together so that they can get where they need to get. Jan is going to talk to us about all of her techniques for how to do that. Let's get started. I want to welcome my guest today, Jan West. Jan, thank you so much for joining me.

Jan West: Thank you. I'm so happy to be here, Deb.

Deb Zahn: Oh, great. Well, let's start off and can you tell my listeners what type of consulting and coaching you do?

Jan West: Sure, so my background is I have a PhD in Psychology and I've always had the broad view in mind or the big picture and so my psychology degree is in clinical but also community psychology. So I started off doing private practice, went into business for quite a while in real estate. Now I blend the two so that I do executive coaching primarily in big organizations, not entirely, but certainly, do coaching. My consulting work is a lot about what I call making work a better place to be.

Deb Zahn: Nice. That's wonderful. And again what typical types of clients do you work with?

Jan West: In my consulting work, primarily small businesses, kind of a little bit past the startup phase primarily, but not yet into very large I would say up to mid-sized companies.

Deb Zahn: That's great. And I know that one of the things you do is you help build teams or do things related to teams, which I think is an absolutely essential skill for any consultant. So can you describe a little bit of what you do for clients related to their teams?

Jan West: Sure. I really do like that work about building teams and there are some components of strong teamwork that seems straightforward and that are often difficult to achieve. And they're very what I call strong skills. Things like trust, things like excellent conversation skills, things like listening. And those are the foundational building blocks of any kind of teamwork in my experience. And so often, people could say we have a problem doing this or that or the other in our team. And so really my first job is to listen, and I like to think about listening as sort of an acupuncture skill where you assess, assess, assess, and then you get right, right, right to the point. That's where the change can start to happen is once you identify exactly where things need to move a little bit and so then that can look like training. Most often it looks like conversation, in my experience.

Deb Zahn: That's great, and what are some of the problems you typically see with teams, so you're doing that in a wonderful act of listening, what tends to come up?

Jan West: What tends to come up is some people feel like they don't or can't speak up enough. Other people feel like they speak up too much. Other topics that come up are things like we don't know how to have enough conflict. That's a pretty common one in teams. Sometimes it's so elemental that people have found it hard on a team to find the time to actually talk about what they do though sometimes it can be as basic as clarifying roles altogether in the room. So that's where the small change comes in, which I'm a big fan of, is people making small and doable changes to get where they need to go.

Deb Zahn: So can you give an example of how you take a team that isn't as functioning as well and you move them closer to better functioning or into high functioning? How do you do that?

Jan West: One thing I like to think a lot about is creating the conditions so that people can do what they do best and the conditions are typically things like creating trust, having certain, what I call, working agreements in a room. So that can be things like assuming positive intent, assuming everybody else has great goals in mind. Assuming commitment or sometimes even checking out commitment and then not assuming certain things such as not necessarily assuming good agreement, but sort of going back over things more than once. "Is this your understanding, is this what you agree? Is this what you were thinking?" So intense clarity is one way to talk about that. And then often the issue becomes clear that once we, let's say, understand that we actually need to say more times when we disagree, it gets easier to do because then there's a pathway for it. After we've said, "Oh, actually this is something we need to do," it gets easier and people step in.

Deb Zahn: I like that because I've certainly worked with a lot of teams, and I remember once working with a team that was struggling, just having a hard time and separately I asked all of them, "What do you think the purpose of this team is? What's its charge?" And everybody described something completely differently. So even though they had a charter, they had something written down, it was a

first step never revisited. And then they all sort of drifted, but they drifted in the same room together but to different places. So how do you teach them those new habits so that when you get them on the right track and better functioning, but how do you get them to sort of form those new habits so they start to do it themselves?

Jan West: Well, the rules of the game are typically accountability but not necessarily to me, and practice. So being clear with whatever my takeaways, what do I want to do after this meeting? For example, having accountability partners and in a team that's pretty easy because you can always choose somebody else on the team or the whole team can work together, the whole team accountable or whatever. And the third thing is practice, so actually setting some goals, "I want to do this twice in every meeting," or, "I want to do this three times over the course of a month," or whatever it is. So really getting down to those teeny-weenie little behaviors that can make a huge difference when practiced.

Deb Zahn: I love that, I love that. And, of course, repetition builds habits.

Jan West: Absolutely.

Deb Zahn: That's a great way to do it. Go back to accountability a little bit because that's something I've seen a lot of teams struggle with in terms of you have a meeting even if things are clear and they got decided, people walk out and then whatever the accountability was supposed to be can often go away. How do you get people to either partner with someone else's accountability or partner within the group to really follow-up on it so that they all start to trust more that everybody's going to walk away and do what they said?

Jan West: Actually, you make it a takeaway, Deb, is what I like to do. So before we might leave the room we might talk about the three pieces: the practice, the accountability and I just forgot the third one, but the habit-forming aspect. Oh, the writing it down, being really clear about your goal and so we just simply talk about that, "OK. Let's talk about who was going to be your accountability partner. You could choose each other. You can choose altogether as a team who'll be responsible for bringing this up. Let's bring this up in every meeting for the next three months. See how that goes."

So I still think of it as a learning lab so that people can see how that kind of accountability system works for them. And if that's not great, we change that into something else. But I think making it part of the conversation instead of sort of an assignment, add-on as people walk out the door, "Oh, do this," because nobody will remember. It's just how we are, we're just too busy, no one will remember.

Deb Zahn: And essentially, it sounds like you're inviting them into the process of problem-solving towards functionality.

Jan West: Absolutely.

Deb Zahn: So when you bring up practice and you bring up those other elements, you're not just having those in your head and then making them do things that move them in that direction. You're saying, "This is our process, and here's what we're going to do together." That's a beautiful way to go at it because I've seen the other version where the facilitator knows or the coach knows, but no one else is invited in the process. They're just guiding a process.

Jan West: Yeah. I don't find that to be helpful. I find the more overtly these things are not only talked about but experienced together, then there's such a rich learning atmosphere. So if you and I are trying to get clear on a conversation, and we kind of go over it a couple of times and, "Oh, I thought you meant that." "Oh, I thought you meant that." "Oh, OK, we've got it, and we're not going to do that again, at least not consciously. We've got a process for how to unravel any kind of stumbling block that we've come to." That's teaching people to fish or yeah, to fish instead of feeding them fish.

Deb Zahn: Right. And then they aren't dependent on you forever to have good meetings.

Jan West: Exactly. I really do think a lot about capacity building and how to leave people stronger and better.

Deb Zahn: That's right. And I think for any consultant, regardless of whether they think that their job or their job as described is team building can practice these things so that when you leave you've accomplished whatever you were supposed to accomplish, but you've also left a stronger team.

Jan West: That's a great point. That's exactly it.

Deb Zahn: Now, let me ask you this because I've certainly seen sometimes on teams there is a person or persons who are maybe disinterested or disruptive or even toxic sometimes, which can make it really hard to work through a team process. How do you typically handle something like that or would you suggest someone handle that?

Jan West: Well, I think situations are so variable, it's hard to know, but I think about that kind of thing as being perhaps a partnership conversation with a leader say me, the consultant and a leader and be thinking about very clearly where a leader wants to take a team, where the team wants to go, how much alignment there is in those two things. So again, I always assume people have positive intent and I assume that that person has some kind of message. The person who isn't maybe feeling the process flowing, and so I'm curious what that is actually. It's very possible that someone has an awareness of an impact that moving forward could negatively impact. You never know. So you do want to know, and then

beyond that then I think there is conversations about effective team membership as well.

Deb Zahn: And would you work with someone like that aside from the team leader or someone like that separately to try and get to what is their motivator for how they're behaving?

Jan West: Boy, that would really be situation-dependent, I think I'd sit the leader.

Deb Zahn: Yeah, and how does a company's or an organization's culture then come into play? So the teams exist within an overall structure, but also within an overall culture. So how does that come into play in your work?

Jan West: It is such a fascinating thing. That whole culture thing. It's one of the most powerful parts of work I think. And I think about people's culture as being the way we do things around here is that doesn't necessarily mean we say, "Well, that's just how we do it around here," but it is how we do it around here, whether we talk about it or not. And so I think a lot of culture work these days has to do with working with change because our pace is rapid, as a country, as a world. Everybody's got lots of information coming at them all the time, and there are opportunities to be proactive or reactive to change, and it doesn't mean we like it.

And so I think there's a lot around helping people understand that they're in it together. That maybe the way we've always done things around here actually doesn't work now but we can bring the good parts forward of that. And some basic values and maybe they need to be played out a little bit differently. But the culture thing always beat any kind of cognitive information.

Deb Zahn: That's right. That's right. That's why what the old adage is culture eats strategy for lunch.

Jan West: That's right.

Deb Zahn: So if you're in an organization or a company and maybe they've outgrown their culture or for whatever reason, their culture's not working for them in a way that lets them get to their goals. What types of activities or things would you do with them that would help get things to start to shift in a good direction?

Jan West: This is going to sound really simple, Deb, but it's really hard and that is I really start by emphasizing a conversational culture that people have to begin talk and listen deeply to each other to be able to make those bonds, to be able to move the culture because otherwise, there isn't a mechanism. Conversation is how we move things forward, and so with the ability and the bravery to converse honestly and enthusiastically, and if not eagerly, we can begin to talk together about what's working and what's not working and begin to move forward from there. So that's at one level, at another level, again, the whole leadership-level,

people know where they're going. There needs to be a messaging about it. There needs to be a big strong why about, "We're going to change culture in these ways," and usually that relates to productivity, retention, employee happiness, motivation, satisfaction, all those things are actually better in a culture that fits.

Deb Zahn: And if you're working on the leadership level because regardless of how an organization is structured, if your leaders aren't with the culture shift in recognizing the importance of change, yeah, you can only do so much. So how do you work with a group of leaders that don't agree on what they think their culture should be? I'm asking you all the tough questions because I've seen this and I want you to solve my problems for me.

Jan West: Oh, absolutely. I would be really something if I could do that, Deb, solve every problem, let me think about this for a minute. Ask me that question again will you?

Deb Zahn: I've seen and heard from other consultants that often you'll have senior leadership who fundamentally disagree about what they want the culture of the organization to be. So you might have one leader that wants an organization where there're permeable boundaries between different divisions and functional areas and we're all in this together and other folks are like, "No, I like hierarchy. I like authority and this is how we're going to do things." And I've seen a mix of things within single leadership teams. And so there isn't that fundamental agreement about what do you want the culture to be like, let alone how to get there. So even before you figure out how to take a path to somewhere they don't agree with what the destination should be.

Jan West: Well, yeah, I think you're right about that. That is the first step, and sometimes it takes zooming way, way out. The how, the hierarchical versus collaborative or whatever the dimensions are may have to be what we get to next but first, there has to be again conversations. "OK, you think we had to go this way? We think we ought to...OK, how should we make this decision?" Again, really articulating all the steps. "So how should we make this decision? We base it on our data, should we base it on productivity? Should we base it on where we think the market is going to go?" So once you get that again, really out in the open and articulated, there usually becomes a form of agreement about something. You want to be successful? "We want to be successful in these ways. We want to be able to hire more people." Whatever. So it does have to start at that basic level of enough agreement.

Deb Zahn: That's great. Yeah. I often call that getting your first yes and the first yes doesn't have to be huge. It has to be something and then you can start accumulating yeses but you got to start with a place that you can actually get it.

Jan West: I like the way you say that.

Deb Zahn: That's great. I hate to say you know where it comes from.

Jan West: No, where?

Deb Zahn: It's a brainwashing technique. I hate to admit that's where I heard it from, so that's not why I use it. But I do find that part of a culture is getting used to listening to each other and saying yes. So getting your first yes is actually a big deal. It can be a big hurdle. But yeah, the origin of it is problematic. Hugely problematic. But I find that it can actually work.

So what is the one of the biggest successes that you've had without obviously, getting into details you can't, but where you've seen culture significantly shift within an organization or a company that is cause for hope?

Jan West: Let me give you a couple of examples, and again, these are really small, but one thing that sometimes happens is people begin to adapt somewhat I'm going to call insider language that's new. And often it's fun and funny. And so when people start to have sort of names for their group or they start to laugh about a certain thing that they've always done in a certain way and it turns out it's just not working, but it becomes a point of camaraderie instead of a point of contention. When that corner is turned and when the humor is not poky when it's a genuine shared experience, then people begin to feel connected and more off to the races. So that would be one thing. Language. The other thing that, again, small, but basic and helpful is to the degree to which people begin to understand each other is more than the impact that they produce.

They can be really tiny things about my dog, about what you're into, cars, about really kind of almost anything. How was your trip? That is so bonding that it helps to get through the rough spots, and so again, when people get to have those relationships feeling more genuine and solid, you can just start to feel the energy start to change and people being happy to see each other differently.

Deb Zahn: I love that. Yeah, I'm reminded of before I was a consultant, I worked somewhere where there was some folks that we had to work with that had a bad reputation. No one liked working with them, but we had to. That was the only way we were going to get what we had to on my team. I had some folks who said, "I just don't know how I'm going to do it," and I said, "It's as simple as this. You have to find something that you like about that person. Genuinely like about them. I don't care if it's their shoes, their dog, their cat, that they make a good lunch. I don't care what it is. You have to genuinely find something that you admire and like about them because that's your foundation upon which you can grow other admiration and other things that you like as you start to work with them." And to me, that's a game-changer. And it has to be genuine. You cannot fake it. You can't say you like ugly shoes.

Jan West: Unless you genuinely do.

Deb Zahn: Unless you do, and then bless your heart.

Jan West: Yeah, a match made in heaven.

Deb Zahn: That's great. So when you think of other consultants, if you were counseling other consultants on the type of skills or knowledge that they need to be successful with clients in whatever way, what advice would you give them?

Jan West: There's a thing that I have really played with over the years, which is I call it managing my energy. And it kind of began for me mostly because I am a fairly strong introvert. I'm not extremely strong, but I'm fairly strong. I certainly have a situational extroversion for sure, but I have learned to no matter what the issue is, "Oh, my goodness, I don't have enough business," or "Oh, my goodness I have too much business," or whatever. The thing is, and certainly, before I ever go into a meeting room with people, is I check in with myself. I manage my energy. What do I need to do if I need to turn it up, what do I need to put down if I need to turn it down?

And that helps me stay. Stay sustainable, stay in uncomfortable situations like let's say the leadership team doesn't agree, "OK, we're just going to be here with this while it's working its way through." So I think it just gives me a stronger seat and a stronger sense of what I'm bringing into the room and how it can best work. So I'm going to encourage people to do that, to develop their seat. My seat happens to be a meditation seat. That's not the only kind of seat. There are many, many. And I think to the degree to which people can check in with themselves and know what they're bringing into the room, that's tremendously helpful.

Deb Zahn: That's right. Because if you're not conscious of it, you're bringing something to the room it could be helpful or it could be not be helpful. You don't know. And people can tell with consultants when the energy is wrong and when it's not conducive to a good outcome, they can't consciously tell the difference, they're going to pick it up in some way, and as consultants, our job is to serve and be helpful. So I love that.

And I do that. I actually stop and I say, "Who am I right now? And how do I want to be in that room," so that it moves things towards the best outcome. And sometimes that's like, "get rid of your grumpy. Put your grumpy aside. You can pick it up later. Pick it up on your way out, and you can go be grumpy again. But you can't be grumpy when you're in that room because they need your best."

Jan West: That's right.

Deb Zahn: That's wonderful. What else would you encourage consultants, particularly new consultants or folks that want to up their game? What type of knowledge and skills do you think would be helpful for them to gain?

Jan West: I use a strategy for getting business that I call planting seeds. And for me, especially when I first started, actually any of my businesses, that was the scary thing was would I ever get any business? And so what I have learned is that I join with people who have similar interests. I join with people I enjoy and this can be anywhere. Women's leadership area or public speaking or the division of consulting psychologists or wherever it is that we have shared interest. And I get to know them and I have conversations and that can be with my neighbor. In a way, it doesn't matter, but that I put energy into the universe so that it's ready and fertile. And then I tend it, so I would follow-up, I would ask questions, I would, so that's what I mean by planting seeds, sort of readying the garden to be able to grow.

Deb Zahn: That's great. And my experience has been because I do something similar is if you're genuine, you're real, you're going to be surprised at how it comes back to you. But I've had folks pop up who say, I just actually had this a week and a half ago, someone I've known for years and just genuinely liked and we have shared interests and we talk about it and she just popped up and asked me if I wanted to do some work with them because of seeds that I've planted over the last several years. I did it genuinely, I did, I wasn't trying to get business. I just was myself in that situation and then she decided, "That's what I need today."

Jan West: That's exactly it. I think that genuineness is what it's about, about liking the person, enjoying getting to know that driving curiosity that I think is so important. And that for me carries me as a consultant is staying curious verses, "OK, I need to make 16 phone calls today and network," and that just doesn't ring true enough for me. My true self doesn't come through then.

Deb Zahn: That's right. Yeah. I love the curiosity piece because otherwise, it's just stale and you're just taking things off the shelf and not curious about what's the best way to do this? What's the best way I can serve? And it's that type of thing. Curiosity that I think distinguishes good consultants from great consultants.

Jan West: That's good to hear.

Deb Zahn: So there you go. Great consultant.

Jan West: There you go. There you go.

Deb Zahn: So I love me some life-balance.

Jan West: I know it.

Deb Zahn: So I got to ask you, and I'm going to ask you other ways that you bring balance to your life, but I know one of the ways when we did the previous exercises, a podcast with the two of us and some other fabulous women, one of the things

that you were going to do is cut back on travel because travel was consuming a lot of your time and energy. How have you been doing with that?

Jan West: Variably. Mostly better. It's interesting, just this past week I had to slip in a little travel that I wasn't anticipating, but here I'm good. But I think for me one of the things about being conscious about it is that it's really helpful to make a conscious choice, "Will, I want to do that this time?"

Deb Zahn: That's right. And you're giving yourself the agency and so even if in using your agency you to say yes, it's almost a different experience than when you just mindlessly say yes to things. It's almost like the drive is different. Yeah.

Jan West: It was absolutely different this week. Somebody needed help and I could do it and I wanted to, and I think that for me was the difference, that I wanted to.

Deb Zahn: That's great. I love that. So what other things have you been doing lately to bring more balance into your life?

Jan West: Well, you might know, I have a little dog with a lot of energy and so it's a lot of structure. There must be walks, there must be playing, there must be outside time, and it's really helpful to me as a human. I have to get up and play with her. And so that's really wonderful. The other thing I did was, so for example, this next week is Thanksgiving. I pretty much blocked out the whole week, my daughter's home from college and so get to hang, which means hike and visit people. I mean nothing special but lots of special.

Deb Zahn: That's wonderful. I love that. I love the dog example because, so you have a dog and you know mine is invariably going to be cats, but for a while I was helping someone with a cat colony. So I was on what I call kitten stakeouts where I was trying to trap some kittens. I would do client calls. I had my computer, and I did work. But I was out there the other day, and I didn't bring my computer with me. I just sat. And when you're doing things like that, you actually have to be patient because you have to wait until they decide whether or not they're actually going to go into the trap. And I remember I was just looking at this gorgeous tree that was in front of me, and I hadn't done it in a while because I had to wait until it warmed up a little bit and I thought, "Oh, that's right. This was me time." This was me time, which I don't feel like I've had enough of and I forgot how much I enjoyed this. And I was doing this for several months where when I wouldn't bring my computer, I would sit. I would look at trees. I did this through the fall. It was gorgeous and beautiful where I was because I was out in the country and who would have known it was all because of kittens stakeouts. I recognize that.

Jan West: That actually sounds like a TV show, if you really want to know.

Deb Zahn: Oh, goodness gracious. Oh, my gosh. I can see it now. My husband rolling his eyes in the background. So anything else you want to share with any new

consultants that are coming into this world or consultants that are trying to be better? Any final words of wisdom for them?

Jan West: I might've said this elliptically, but I'm going to say it again and that is surround yourself with great people, people who believe in you, people who know your worth, people that you think are fun, people that not just you want to play with but you want to work with. I think as an independent consultant like myself, it's easy to get isolated, so actively working with people who'll really uplift you can be so important, so I encourage that.

Deb Zahn: That is wonderful and what a wonderful way to end a podcast is to exactly do that because that'll make everything you do richer.

Jan West: It sure does.

Deb Zahn: Wonderful. Well, Jan, thank you so much for joining me on this podcast. I greatly appreciate it.

Jan West: Thank you, Deb, my pleasure.

Deb Zahn: Thanks so much for listening to this episode of the Craft of Consulting podcast. I want to ask you to do actually three things. If you enjoyed this episode or you've enjoyed any of my other ones, hit subscribe. I got a lot of other great guests that are coming up and a lot of other great content and I don't want you to miss anything, but the other two things that I'm going to ask you to do is, one is if you have any comments, so if you have any suggestions or any kind of feedback that will help make this podcast more helpful to more listeners, please include those.

And then the last thing is, again, if you've gotten something out of this, share it, share it with somebody you know who's a consultant or thinking about being a consultant and make sure that they also have access to all this great content and all that other great content that's going to be coming up. So as always, you can go and get more wonderful information and tools at Craftofconsulting.com. Thanks so much. I will talk to you on the next episode. Bye, bye.