

Episode 101: Common Mistakes Consultants Make and What to Do Instead—with Dr. Scott Thomas

Deb Zahn: I want to welcome you to this week's episode of the Craft of Consulting Podcast. In this 101st episode, we are going to dive into common mistakes that consultants make that either stop them from getting business or stop clients from continuing to want to work with them. I brought on my fabulous and favorite guest, Dr. Scott Thomas, who also happens to be my husband, but was a longtime consultant. I, of course, am still a practicing consultant. So we're going to go through our top common mistakes and we're going to say, "Don't do this. Do this instead." How does that sound?

Dr. Scott Thomas: Sounds good to me.

Deb Zahn: All right. Let's dive in, then. Let's start with the first one. And we created a list. In some ways we made sure that we hit some of our big pet peeves on this one, which we've seen way too many times. But let's start with the first one, which is taking a stance or giving a feel of arrogance or that you know and you know better than the client.

Now I am sad to say that I have seen this way more than I ever want to see this. I actually had an experience once where another consultant was on a phone call with a prospective client and some other consultants. There was a person who was taking this really arrogant stance related to the client and basically making it sound like the clients didn't know what they were talking about and were idiots. She's live texting me what's happening. It was just so painful for me to hear it because it's the height of disrespect. And it's also just really unwise because part of what you want a client or a prospective client to feel is, "I really want to hang out with this person. I actually want to spend time with this person." When I see that arrogant standpoint, which crosses over from, "I'm an expert and I know what I'm talking about," into arrogance, it's a huge turnoff. It's a huge turnoff for everyone involved. What do you think, Scott?

Dr. Scott Thomas: I'm fortunate that we haven't had too many of those. I don't think I'd last too long.

Deb Zahn: You would not handle that well.

Dr. Scott Thomas: In the room, no. So I'm fortunate, and I think you've run into that more in your work than I have.

Deb Zahn: Yeah. Because you wouldn't have the patience for that.

Dr. Scott Thomas: No. I wouldn't.

Deb Zahn: So we've just started with a little insight into who you are. You do not tolerate things like that. So let's talk about what you do instead, which is really about bringing an appropriate amount of respect and humility when you're engaging with clients or prospective clients. And Scott, you have something, a framework that you use. I actually haven't heard this called what you call it anywhere else, but talk a little bit about the framework you use when you're engaging with folks.

Dr. Scott Thomas: It's a framework I didn't even know I created. It started to show up with the different places I was working. What I refer to now is the Mutual Expert Model. And it's because I ended up going into settings where I definitely had expertise, in terms of what I was bringing in. But I've worked in very

complex hospital settings. I've worked in universities. But I've worked in lots of different community settings, and I've worked in prisons. There's no way I can be an expert in how they operate, how they think, what their culture is or anything. So the Mutual Expert Model was basically, I own my expertise. I'm like, "Here's what I understand. Here's what really works. Here's how I think people behave. Here's how they respond. How does that work with what I'm saying for where you live, and what you do, and how your organization operates?"

So that Mutual Expert Model, they pick up very quickly. I know you're referencing it in terms of humility. But for me, I wouldn't even say it was humility as much as just like, "I don't know. Here's what I got. What do you got? Let's figure this out." So it's much more, again, the term is the Mutual Expert Model, and you truly believe it. It's not like faking it like, "Oh, well, I should listen to what the community thinks." It's not that. The community understands things that you don't. So it's pretty easy once that's there. And I guess once that got sort of planted in me, I just carry it wherever I go.

Deb Zahn: And that's how you approached, I know some of your clients too. Because they want somebody who's showing up with things that they don't have because otherwise, they could just do it themselves. Unless the reason they're hiring a consultant is because they just plain don't have time, or they don't have the people power. Usually they want people who are showing up with something, but they also want to be respected. They also want to be able to bring their expertise in the same way you talked about it in their context to the table. Because they've also experienced in the past where lots of consultants have come in, or projects or initiatives started, and then they died on the vine. And smart people just sort of wait that out. They just run down the clock until it's over. A lot of times, the reason that happens and they fail or they flounder is because the mutual expertise of everybody sitting around the table was not brought to bear on the decisions that were made.

Dr. Scott Thomas: Absolutely. That's what I mean by...Again, I think humility is good. But I have no idea how you figure it out just from your side, in terms of understanding. There are just so many moving parts. So many factors. That, again, I definitely trust in my expertise with what I know. But then, all the other factors that come to bear on something successfully taking place is, it's unknown, except for them. They know.

Deb Zahn: Yeah. Exactly. And that leads us into the other one, which is, we'd call this one of the things that drives you crazy, which is when consultants come in and they don't gather appropriate information intel, either before, during or after an engagement or after they have some connection with the folks on the client side who are working on it. So say a little bit more about that. What does that look like and how does that show up? In sort of the bad version, then we'll talk about the good version.

Dr. Scott Thomas: I've had one fairly recent. It was pre-COVID, so it was about a year and a half, two years ago. Where we had some folks who made the effort of driving hours to get to us to a group of sort of partner organizations that were trying to get something done. We needed some outside expertise on a few of the issues. They showed up, and it looked like they really hadn't dug into the details of what we were doing. And then, most amazingly, they were there for three hours talking at us about who they are, what they do, how they get things done. They had all of these partner organizations just sitting there, rich with information. And then with about 20 minutes left they kind of said, "So tell us a few things about what's going on."

Deb Zahn: Yikes.

Dr. Scott Thomas: It was quite mind blowing. Because in some ways, you could see that as the opposite of the Mutual Expert Model. Because they came in as models and just then they thought they'd maybe get a little info from us. And the level of expertise we had sitting around our table was pretty darn high.

Deb Zahn: Right. And if you're a consultant who knows your stuff and you have that many experts sitting around the table, you should be like a kid in a candy store.

Dr. Scott Thomas: No. I would have been excited. If I was on their side, I would have looked over at us and said, "I've got some stuff here, but can I just start asking questions?" And I probably would have mined the group for information, strategies, what hasn't worked, why are you calling us in, and then maybe gotten around to, "OK, here's how I think I can add into that." But, they flipped the whole script on that.

Deb Zahn: Yeah. But the power of asking questions that you truly actually want answers to. And then you could show your, and I do this a lot, and this is a lot of times how I get business, is I will ask questions to delve in deeper. Trying to get at the heart of what the problem is or what their aspirations are. And then I will frame things and I'll say, "So here's what I've seen other places." Does that describe what you're experiencing, or do you have this version?" In doing so, I get to show that I know my stuff, but it also takes me down another level and now I'm getting even more information that's going to help me figure out how I can help them.

Dr. Scott Thomas: And I think that helps the people you're consulting too greatly because a lot of times they're so in the weeds of it, they need a consultant to come do exactly what you just described, which is, "So I'd kind of like to put a frame around this. Now you've mentioned this..." then put a frame around that. And then maybe this other third topic or issue, put a frame around that." And everyone sitting there goes, "OK, that's helpful for us because we keep bouncing around between the three of them." So I like how you just described that about you go in, and then you can dig into each and ask. But then they also know you're listening. You know this. You've probably had experience prior to how you can frame this stuff so quickly.

Deb Zahn: That's right.

Dr. Scott Thomas: On the fly. So basically you are. As a consultant, you're showing your chops too, it's good old...In counseling, they call it reflective listening. But you're reflecting it in an intelligent way of, "Now let's talk about it in this framework."

Deb Zahn: And you've given them value. Both intellectual value, but also emotional value in that moment. Because they often may know what the problem is. They may not know exactly what it is. They may not know how it's necessarily connected to other things. By being able to go in and ask enough questions that you can start to put together some of the puzzle pieces, that's soothing to them. It's exciting to them. It's interesting. They're now thinking about things in a different way. And they're going to want you by their side.

It goes back to one of my favorite things that I always say about consulting is that every experience that a client or prospective client has with you tells them what it's going to be like to work with you. Those folks that showed up, and I've seen it before too, where consultants show up and they just talk, talk,

talk, talk, talk, and it's all about them. That tells you what it's going to be like to work with them. That's the truth in advertising.

That means that they're probably going to have a difficult time asking questions when they need to during an engagement, seeing things from your perspective during an engagement. You're going to hear about them all the time, which is going to get old and annoying pretty fast. It's sending signals that make them not want to work with you.

Dr. Scott Thomas: Yeah. And the danger is, they may override those because what you're saying is so true. I told you recently. This is in the past month where we let a consultant go, and we should have known better. Because it's what you see is what you get. When we were interviewing him to do some work, he was a talker. If there's something that's my Achilles heel, it's definitely talkers.

Deb Zahn: To your wife who does a podcast, but that's OK.

Dr. Scott Thomas: No. You do intelligent talking.

Deb Zahn: Why, thank you!

Dr. Scott Thomas: I'm talking about just mindless talking.

Deb Zahn: Good save.

Dr. Scott Thomas: Details that people don't know. And then, a reference to this. He talked about...And it's like, just, "Stop!"

Deb Zahn: Yeah, yeah.

Dr. Scott Thomas: But I was part of a group that was hiring, and as the group we said, "All right, well we'll give it a try." I was hesitant. But it's what you see is what you get. So what you're saying about that first experience. We ended up letting him go. He did, what'd he do? One, two, three, three, or four sort of rounds with us of work, and we let him go. We let him go after deciding, OK maybe we'll talk with him and fix it. Then we decided it's not fixable. But that, what you were saying about that first experience, and here's what the consultant's going to bring, we oftentimes talk about a good part of it is anxiety management.

If people are bringing in consultants, they're anxious about either a deadline, how something's going to get done. Is there stuff we don't know? So if they're experiencing something like anxiety management, their anxiety goes down and there's a little clarity, boom. All of a sudden, they're getting something right there. What we did was, we overrode, which is this guy talked, talked, talked. Listened a little and then talked some more. And then, when he showed up as a consultant, that's what he kept doing. And now he's not working with us.

Deb Zahn: Right, which is actually worse than not getting it in the first place. Yeah, so the experience you give them, you want them to have a good emotional response to it. That should not be increasing your anxiety. It should be reducing it. Because in the best of all worlds, I was actually saying this once to a client that I had who I was the first consultant he ever worked with. He didn't know what it was

supposed to be like. I explained to him at one point that, "This should be your easiest relationship of all the relationships you have in your entire life. It is super clear. My job is to help you accomplish things, solve problems and make your life easier, and have fun while you're doing it. That's my job." And he's laughing. He's like, "Well, that doesn't seem to be anybody else's life in my entire life."

I said, "Well, that's the point." But you have to deliberately give either prospective clients or existing clients that all the time. And if you aren't gathering intel when you're doing the initial discovery meeting, if you're not doing it during it, then you're going to run into trouble. Even if you get the gig, and I think your example's a good one. Even if you get it, it doesn't mean you're going to keep it. Not keeping it is worse than not getting it. Because now you've left a trail of angry, frustrated, annoyed people. And that's not good for your reputation.

Dr. Scott Thomas: No. Not at all.

Deb Zahn: Let's do my biggest. This is the one that drives me crazy, is not being prepared. This is a big don't-do. I'm going to talk about what to do instead. But I've sadly seen this more times than I ever care to, which is not showing up when you're going to be in front of either a prospective client or client having done your homework. And here's what I mean by homework. If it is an engagement you're trying to get, you should know about who the client is. Who you're going to meet with.

Have they written anything? Are there videos on them? Have they been on podcasts? What is it that's happening in the larger context that they have to contend with? Doing that type of research ahead of time, so that you're not just going in and expecting them to do the work for you, which again, gives them an experience of what it's going to be like to work with you, and that you just want them to answer all of those questions because you didn't bother to do it.

When I used to hire consultants, I was on the receiving end of this, and then I've seen it other times with other consultants is where they didn't even look at the website. And you could tell they didn't know what the organization did or anything that had happened. I saw recently where someone showed up in front of a client and had not read what they were supposed to be doing. Had not read anything that the client expected or the contract that had been signed, the proposal that had been submitted. And so they literally had no idea what the purpose of it was.

That was 100% avoidable, and it was embarrassing to witness it. And, it shows tremendous disrespect. My point is, is always do your homework. Show up prepared. It doesn't matter if your client's prepared or not. They have the lives that they have; they have the work lives that they have. If they're not prepared, that's no excuse for you not to be. And in fact, it's a reason you should be more so.

The intent is to make the entire experience for them where you are always the most prepared, always ready and able to get to the solutions, get to figuring out what needs to get done and to have everything at your fingertips to be able to do that. If you do that, again, you're going to stand out in their mind because a lot of consultants don't do that, or even people they work with don't do that.

And they're going to want to work with you more and more. You got anything to say about the preparation thing? That's all, that's me. You know I rant and rave about that if I see it.

Dr. Scott Thomas: Because you and I talk all the time about prepping. I would say, as consultants, that's one of the biggest things we have in common, which is, prep and prep again. You think you know it, you prep.

Deb Zahn: Yeah.

Dr. Scott Thomas: I prep for stuff that I might have done for 10 years.

Deb Zahn: Yeah.

Dr. Scott Thomas: Because without the prep, there's no freshness. Without the prep, you're kind of thinking while you're supposed to be doing and conveying. You don't want that kind of delay, as it were.

Deb Zahn: That's right.

Dr. Scott Thomas: Prepping gives you, yeah, again I think it's freshness and you're right there.

Deb Zahn: What's that thing you say about basketball?

Dr. Scott Thomas: I'm always saying that everyone preps. High school basketball teams prep. There's no such thing as not prepping...I mean, I think of these multi-million dollar athletes who have a pitcher, who has a pitching coach. Why? To sharpen it up, to clean it up, to make an adjustment. So there's no such thing as not doing it, except for people who show up and then they haven't prepped.

Deb Zahn: Yeah. And I've seen where preparation can look like you've thought about things ahead of time, maybe you took some notes. But you and I prep in a very, very similar way, which is we say things out loud. Because we're trying to create or recreate the muscle memory of saying things. And we're trying to think through how we are saying things in a strategic way that actually leads to the outcome we want. It's not just saying things because we want to say it. But we actually practice it out loud.

Even though I've been a consultant for over a decade, you were a consultant for seven years, each and every time I'm going to meet with a prospective client, I think about and say out loud how I'm going to introduce myself. Because it's always a little bit different. Because how I introduce myself relates to who they are. Not just my resume. Goodness, no. It should never be my resume. There should also always be a strategy associated with it.

If I don't prep and I don't say it out loud, I will babble. It doesn't matter how long I've done it. I will talk longer than I want and I will say things that I don't want to say.

Dr. Scott Thomas: Yes. I think that's always a marker of someone who hasn't prepped, which is they talk too much.

Deb Zahn: Yeah.

Dr. Scott Thomas: Which is if people have prepped, they know what's important to say. Again, I'm pretty sure in theater it's called running your lines. I think we both do it. We say the things out loud. You need to be saying the words. Your mouth has to be moving. The muscles have to be doing it, especially if

there's any training involved or something like that. I would run the beginning part over and over again, so that when I get up if I'm nervous, I don't know where I am or anything, I'm saying the words and it's already there. Then I can start to go with it, as it were.

Deb Zahn: Yeah, yeah. I was coaching someone recently who was very, very wise and was preparing for how she was going to introduce herself because she had to introduce herself to a whole bunch of people that were going to be involved in this larger initiative. One of the things that we talked about is what outcomes do you want even out of introducing yourself? Which seems silly and mundane, but it was so important. Because what we realized is, part of what she was ultimately charged to do, there wasn't really a good understanding of what that is or what that meant.

So how you introduce yourself can set the stage and explain it without saying, "Oh, and let me explain this concept to you," which makes people's eyes glaze over. But if you weave it into how you're introducing yourself or how you first engage with them, now they're gaining a better understanding of what it is without you teaching it to them like a teacher. Now you're having a conversation about it. But she's practicing it out loud for all the reasons that we talked about. So I love that.

I probably, I think I get most of my business, in part because of how much I prepare. And I still do it until this day. I don't rest on my laurels and my past experience.

Let's hit another one. We've got like three more left that we want to get to. But this is definitely one that you care about, which is, if folks hired experts, but they get the B team. Say what that looks like.

Dr. Scott Thomas: I was part of a group that, again, they're experts. This was a hospital setting, and so they knew how the hospital operated. They knew the culture of the hospital. They had hired this group because I guess the initial interviews and everything looked really, really good. And then they brought them in to say, "OK, let's see what you've been working on," and they pulled me in because of the area of expertise I was in, and, they sent the B team.

And the B team was kind of saying, "We'll do this, and then we'll do that." And we realized this isn't who we talked to. This isn't the level that we were expecting. And they came in as the B team. I don't know what they were thinking. I think they were thinking, "Maybe we can save some money. We sent the sales team in initially. Now, we know how to do this." And they grabbed some boilerplate stuff, and they threw some boilerplates up.

They literally, I won't say who did it, but they lasted I think 10, 15 minutes into their presentation before they were cut off. I think we might have talked with them for another 20 minutes, and then we had them out the door.

Deb Zahn: Yeah. And this can show up in a lot of different ways. One of the things is, if you work at a firm, you've got to consider who you're putting in front of the client, not just to get the sale but when you're doing the engagement. Or even if you're an independent consultant and you work with other people. So I had an experience once where it was a brand new client. I didn't have the time. So I put somebody in who on paper looked like the exact right person to do it. But the mistake I made is I didn't think through what does it take to actually engage successfully with this client.

I wasn't just filling a staffing hole. I was actually, I had to think about what was actually going to lead to the success, and I didn't think about it carefully enough. It didn't go well. Luckily, the client reached out to me and said, "Deb, what the heck? Here's what I want. What I want is you," because I'm who originally talked to her. And there were other people on the team who were doing a great job. She said, "Yeah, I want them too."

Luckily, this ended up being a long-term client of mine. I'm still doing work with them. But that easily could have been fatal. The problem is, if that's fatal, people talk. So it wouldn't just be, "Oh, and they're never going to hire me or hire us again," but there are a whole bunch of other similar types of entities that they also had a conversation with. I know that for certain because when I was talking with one of them, this was a year later, a year after this engagement, which ended up working out fine because I stepped in and someone else stepped in. But I went and met with another similar type of entity, and in the initial meeting she said, "So, I just want to make sure if we do this, I'm getting you and I'm getting so-and-so." I smiled and I said, "Oh, you talked to so-and-so." And she said, "Yeah, and she warned me to make sure that I get the right people." Again, that's not the type of scenario that you want to run into. So you have to think about what actually can accomplish it. There might be people who don't have as much expertise, and maybe they're still on a team. They play a different role that's suited for what they know how to do and it helps them learn.

But if you're selling expertise, you've got to have the experts, or you're going to basically feed into I think that reputation that drives a lot of people crazy about consultants. You get the people that sell, and then they send in fresh faced folks that don't know how to do it. That drives people crazy. And that's why they maybe don't go to some of the Big 5 firms. They go to some of the other firms that have a different model, where you can actually get experts or individuals. Anything else that you would do differently? You would tell people to do differently to make sure that clients get what they need?

Dr. Scott Thomas: Well, do you want, we could dive into what we like?

Deb Zahn: Yeah.

Dr. Scott Thomas: Yeah. I think, again, if I can almost circle back to the Mutual Expert Model, is the reason that that framework works is that you bring curiosity. You don't know. Honest curiosity. And hopefully if you're a consultant, you have some intellectual curiosity about what is this problem they're dealing with? How would this get resolved? Because that then re-excites them. They may be anxious because they're on deadline, or they're stuck with something. But if you're a consultant coming in and all of a sudden you bring in kind of this interesting aside, or here's an example of where we were trying to solve this but went the other way.

Even that type of conversation reignites people to why they were even attempting to work on a particular project or something. So curiosity, good conversation. The things that I would say we generally like in life should be part of consulting, with the idea that there's a level of expertise. You're trying to get something done. You're trying to be very successful at it. But again, for it to work, it has to be enlivened in some sort of way.

Deb Zahn: Yeah.

Dr. Scott Thomas: Like I say, I used the term boilerplate before. The consultants that come in with a model of some sort, models don't translate. Principles translate. If you come in with intelligent principles of operating in success, then that works. But if you have a model on how something's going to be done...I don't believe I've ever personally seen that work.

Deb Zahn: Right. In a real world setting that actually has complexity.

Dr. Scott Thomas: Right. The model is, again, to give you hints of these are important principles. So the best consultants I've had, which is they come in and they start talking, and 10, 15 minutes into it, I'm just having a really good conversation and we're problem solving. A consultant is...Most of life, most of it, doesn't matter what it is...arts, sports, writing...is problem solving. You read about most authors. They talk about it's just this one continuous, here's a plot, but I'm just continually problem solving.

Deb Zahn: Yeah.

Dr. Scott Thomas: And if you have a consultant that comes in and says, "All right, let's start talking." "Oh, wait. What about this?" Again, that's how things get resolved. But, yeah. I've had very good experiences with consultants, and it's usually people who come in, and we just kind of get to work together.

Deb Zahn: Yeah, and you dive in. What you mean by the B team are the folks who come in and just like, "I do stuff." And if you need consultants who are just going to do stuff for you, that might be fine. But in most engagements I've been involved in, you have to have what you're describing, which is that enlivened curiosity about how do we actually get you to the outcome that you want?

Dr. Scott Thomas: And I would say, I suspect for most of the type of consultants who are listening to your podcast, this is what they can bring, which is going to be different than maybe a place with big consulting place. Again, they tend to have models, and boilerplates, and this, that and the other. I think what most of the people listening to your podcast probably are like how we're talking about things.

I would say that's the strength. That's what I've always responded to, which is that's the strength they would bring, which is they show up and they're like, "Hey, so what's happening? How could this work?" Again, that enlivened curiosity problem solving is what they can bring that a lot of big places can't. Because they've got to follow first of all for A, and then if that doesn't work you've got B and C. Well, guess what? It's actually P, R, N, X.

Deb Zahn: Right. And we'll pepper it with a little A.

Dr. Scott Thomas: Right. Yeah.

Deb Zahn: Yeah, and that doesn't mean that you can't have models and way you do things in your toolbox. But that means that you're going to pull out the right tool, at the right time, for the right purpose. Most clients that I see or that I've talked to, including the ones that I've had on the show, they want to know that you're thinking about it that way, and not just saying, "Here's what we do. It doesn't matter if it doesn't cure your particular ailment. Here's what we do."

Dr. Scott Thomas: Yeah, but that's the right balance you're saying, which is I'm definitely not saying, "Oh, you're just curious, and interested and it's chatty, chatty." You're doing that so you know where to reach in your toolbox and offer something real and solid.

Deb Zahn: Yeah.

Dr. Scott Thomas: When I was consulting, I had real things from real-world experience. You could almost call them mini models, which is because this little thing here would fit right there. So you definitely have to have real good stuff in your toolbox of things that are going to impact what they need to get done. But the conversation and everything tells you, "OK, now where do I need to reach in?" And, again, this is opposed to people who come in with something from the toolbox and lay it down before you've had that good solid conversation.

Deb Zahn: Yeah. It's like going to a restaurant and them saying, "You're having this."

Dr. Scott Thomas: Right.

Deb Zahn: And you're like, "But I don't eat meat." And they're like, "Don't care. We're having steak tonight."

Dr. Scott Thomas: Yeah. This is what we're giving. Right. So, yeah, I do want to underscore that you've got to have the goods and real stuff that someone can work with, but you don't know which one it is until you've really had the good conversation.

Deb Zahn: That's right, and probably more than one. So this fits perfectly with the next one that we want to just talk about a little bit, which is the don't do and the common mistake is being really rigid. There are some consultants, and it's a perfectly legitimate way to do it, who are like, "Look, I do X. I do X better than anybody else. If you need X, I'm who you come to for that, and you'll be golden." And that's great. And if there are consultants out there that that's what your model is, and you can back it up with the results, that's a beautiful thing.

For a lot of consultants, it doesn't look like that. It's messy. It's people. It's systems. It's contacts. It's a whole bunch of things that are in play all at the same time. What I have seen happen, and it's frustrating for everybody when it happens, is like you agree to a scope. You agree to what you're going to do. And then, you get in and you either see that the situation is different than what you expected, or something big happens. I don't even mean like a COVID type thing, but something happens that creates a new shift. Somebody leaves their job. A new person comes in. There's a major shift in the market that wasn't anticipated. There's a major disruption in your supply chain. Whatever it is. And if you stick rigidly to, "No, no, no, but this is what we said we were going to do," as opposed to, and I think this is where the enlivened curiosity comes back in, what does it actually take to achieve the outcome you want, or is that still the outcome you want, and does it make sense within this context? And if not, what can we switch up?

So one of the things that my clients have told me that they like best about what I do is that I'm more interested in the outcome than what we agreed to at the onset. The caution with that because there's a big caution, and you have to be very skillful to handle it, is if the scope changes you have to renegotiate, if it impacts the budget, you have to renegotiate. This is where negotiation skills are really important.

So it's not that you're...By not being rigid, which I think can be a consultant's superpower is too much of it can be a bad thing, it doesn't mean you say yes to scope creep. It doesn't mean you say yes to scope leap or you're just willing to bend over backwards and do whatever they want. But you have to care about the outcome. If you care about the outcome, you're going to be willing to switch things up when it makes sense. And then you know if you do that with that comes these other things you might have to do as a consultant.

So let's do the last one. Because the whole rigid thing was mine. Which is, straying outside your lane. We've experienced this, where suddenly you're doing a project that you're not really well suited to do. I've certainly seen that where somebody's off trying to sell themselves as a consultant for something that's really not a fit. It can show up a lot of different ways. But I certainly think that it's important for consultants, including myself, to be really, really clear about what their skills are and their expertise.

That doesn't mean that they fit into a narrow box. Because a lot of those, that knowledge and that skill is transferable to other things. But you also have to embrace when you're completely into a zone that you should not be operating in.

Dr. Scott Thomas: Yes. Yeah.

Deb Zahn: We remember. We lived through that, didn't we?

Dr. Scott Thomas: I lived through, well a major time and then a couple minor times. It's funny is I don't think of us as purposely straying out of it, but almost being nudged out of it.

Deb Zahn: Yeah.

Dr. Scott Thomas: By requests and, "Well, could you do this," and stuff, and kind of agreeing to it. And then, all of a sudden finding oneself out of your lane and saying, "I don't like this." Yeah, I had a miserable time.

Deb Zahn: So we've got to tell folks what happened because, by extension, we both had a miserable time. Which was, it was a federal opportunity that there was a feeding frenzy around. So everybody was trying to hire any consultant that they could get their hands on to help them with it. Because the people who were really best suited to work on this were nabbed immediately. And I don't mean to sound pejorative to us, but this wasn't really what we did. We ended up, you and I, actually, because this is when we had some overlap of being consultants, you and I ended up on a project together, which normally would go very well. But it was in an area where we were not familiar with. We had somebody on the team who was supposedly very familiar with it, and we found out wasn't. And we made it happen, but we had an awful time. It's not fun on the consultant side to realize I don't have everything that is needed for a particular client. If you can know that ahead of time, I would say the best thing that you can do is say no to an engagement because you're not going to be happy when you're in it, and they're not going to get what they need and they're not going to be happy in it.

But there can be...In our case, it wasn't a desperation. We felt bad for them, so we said yes, which we shouldn't have. But it could just be like, "Oh my God. I have to get work, and this client is like..." And you're right. It happens. It's happened to me where they're like, "We don't care if you don't think that this is your expertise. We know you're smart."

Dr. Scott Thomas: "We need you." Yeah.

Deb Zahn: "We know you're good. We need you. Just do this." If it is outside your lane so much so that you cannot envision how you're going to deliver the results that they need, say no.

Dr. Scott Thomas: Yeah. And again, I think most of your listeners. Well, I don't know, actually, because I don't think we knew upfront. Like I say, we kind of got nudged and slid into it, and then all of a sudden we were there. Maybe it's more like a caution of...Again, I'm pretty sure most of your listeners probably wouldn't say, "What the heck, I'll do that even though I don't know." I can see just the slide into it. And boy, once you're in it, though, and you've got to give a result and it's not what you do. It doesn't matter if you know other stuff. If you don't know what they're asking for, you don't know.

Deb Zahn: That's right. And it's better to say no. Now this didn't have any negative impact on either of our reputation, but it easily could.

Dr. Scott Thomas: Luckily, no, it didn't, because it was so far out of my lane no one in my lanes knew what the heck I did.

Deb Zahn: Wait. Did I make you do it? Is that...

Dr. Scott Thomas: Probably?

Deb Zahn: I probably did. That sounds like me.

Dr. Scott Thomas: Luckily, no one ever found out. I go by my middle name, so I think I used my first name, so no one could have looked it up anyhow.

Deb Zahn: So you're in the witness protection program.

Dr. Scott Thomas: I am in the name protection program. That's the benefit of having multiple names.

Deb Zahn: Yeah. But it's easy to do. Particularly if you're just eager to get work. Sometimes how I've seen this happen is I will show up and a client just likes me. And so, they think, "Well, she's a consultant, and so consultants can do..."

Dr. Scott Thomas: Do stuff. Right.

Deb Zahn: Do everything. And that's not true. And sometimes you have to take great pains to set appropriate expectations with your clients. I had that, where someone wanted me to do some specific type of executive leadership work. And I had to end up telling the client, "I respect that work so much and what it's trying to accomplish that I respect that I don't have those skills. Am I good at coaching? Yes. This is a whole different thing, where there is a body of knowledge and practice that has been built up over time, and things that have actually been studied, and tested and etc. I respect that so much that I can't say yes to this because you need somebody who's going to be able to bring their A game, and I can't. Like, I can muddle through. I could get maybe a C+, a B-. But you need to get an A on this." And that's how I described it. And they still tried to nudge me a whole bunch to get me to do it. I just refused because I knew I wasn't going to be able to give them everything they needed.

Dr. Scott Thomas: Then you have a miserable time anyhow.

Deb Zahn: Yeah. It sounded horrible. Because I know what I'm good at, but I also know what I enjoy, and I don't enjoy that. These are our big ones. Any last words of wisdom for consultants that's a big, definitely do this?

Dr. Scott Thomas: Well, no. I think doing this is just I guess I'm going to go back to the original stuff, which is to be curious, be engaged, be willing, and have something real that you can offer.

Deb Zahn: Yeah.

Dr. Scott Thomas: So it's a combination of soft skills and hard skills, or something like that. Which is be willing to be engaged in the process and have something for real. I've been talking about the soft stuff a little. But the real reason I did OK as a consultant is that I had something real. So when I did go to my toolbox and I showed it, people were like, "Ah! That's going to help us."

Deb Zahn: That's right.

Dr. Scott Thomas: I do want to give that balance, which is it's not all...I'm kind of talking the talk side, and the curious side and everything. But it's because I had done...The reason I became a consultant or how I could become one is I had 10+ years behind me doing the work in that area. So my toolbox was full of real legitimate stuff. So I guess what I would end on is that balance.

And maybe you're like, "Wait. I'm engaging. I'm curious." And then the question becomes, how strong is your toolbox? How much variety do you have? How powerful is it? You've got the good tools and stuff. And maybe you're all toolboxes and you're OK with the people. I'll talk to them a little. And maybe you've got to work on that side.

Deb Zahn: Right. Or pair up with someone who has it.

Dr. Scott Thomas: Yeah. Pair up with a chit chatty person who gets them going. Then they say, "Hey, you take over and explain how that gets presented that way." And then you take over for that. I think what I would end up with is just to balance some of the talk that I've done is to say, and then you've got to have something real in your toolbox that will make a difference to the people who have hired you.

Deb Zahn: Right. And that's why you were successful for seven years without a lick of marketing. You never marketed. I don't think you ever did any outreach either.

Dr. Scott Thomas: I had a business card.

Deb Zahn: You had a single...he had a single business card. Like, literally one physical business card.

Dr. Scott Thomas: So I could show people something.

Deb Zahn: But then you had to take it back.

Dr. Scott Thomas: But what that shows you, though, is you can get hired if you stay in your lane and you offer something that helps people. Again, it's back to, I know you talk a lot about value. Are you offering something of value? That's why. And when I kind of stepped, a couple times, I mean we didn't go into it with this one time when you were talking about stepping out of the lane. I tried a couple different times.

I tried doing some facilitation work. I'm not a facilitator. I'm a trainer. There's two different...So that's interesting.

Deb Zahn: Yeah.

Dr. Scott Thomas: Those are two totally different skill sets and stuff. You're a very good facilitator. I get bored halfway through, which isn't good when you try to facilitate. Then, you're kind of looking out the window. "Oh, look."

Deb Zahn: "Oh, squirrel!"

Dr. Scott Thomas: "Squirrels."

Deb Zahn: So we actually had a mutual client, which is funny. We had a person who'd worked with both of us as consultants, separately. She pointed out to me once the difference between us. She said, "So I bring Scott in if what we want to do is known and he helps us figure out how to actually get there." She said, "I bring you in when things aren't known and we need somebody to actually figure it out with us, where is it we're actually trying to go."

Knowing the difference between those, you then would not seek out work that required facilitation. And, I'm a good trainer...

Dr. Scott Thomas: And you can train, yeah.

Deb Zahn: I'm not as good as you, but I specifically seek out work where people need to figure things out together.

Dr. Scott Thomas: Yeah. And it is a good thing to reflect how those...I don't want to say narrow those lines are. But in some ways, which is, again...I mean, I was given a number of good opportunities to facilitate. I was not brought back. So I was probably one of those consultants who thought, "Boy, he was great in the interview. Then we had him come up here to help facilitate this thing, and wait a minute."

Deb Zahn: "And he's staring out the window looking at a squirrel."

Dr. Scott Thomas: "And he's looking out the window," and then he's reminded, "Excuse me, you're supposed to be kind of leading us." Yeah, I did OK when I was doing what I did. When I didn't know, I was a bad consultant because I thought I could facilitate, and I couldn't, partly because I don't find it interesting.

Deb Zahn: Yeah, and that actually does matter. Whereas, I find the puzzle of facilitation fascinating.

Dr. Scott Thomas: And I love the...When I train, I find it very engaging, and I love the Q&A. It's the whole educational environment. It's not training like, "OK, learn this." It's basically so, "Here's something, and now what do you get back? Here's something else," and we're headed somewhere. Yeah. Training and facilitation are very different skill sets. And there are some people who have both. I definitely have one side more than the other.

Deb Zahn: But people hired you a lot for it, so that's a wonderful thing. Folks, I am not saying don't do marketing. He was in a field in an area and had connections that really helped facilitate having a robust business. If you have that, that's great. For folks that need to expand beyond that, that's where doing marketing and outreach is helpful.

Dr. Scott Thomas: Yeah. I would reiterate that. There was nothing magical about what I was offering. I happened to be offering something at a time where there was money flowing in the area, and I was a known entity. And so people were getting money to get things done, and they knew I could help with that. So it was a very unusual circumstance. If I was to go back to consulting now, I'd have to be doing everything you're talking about. You gotta have...there are these things called websites, and then there's...

Deb Zahn: Podcasts. Like, you'd listen to my podcast.

Dr. Scott Thomas: I would listen. They're, what? Podcasts.

Deb Zahn: They're podcasts. Yes, dear.

Dr. Scott Thomas: So, are they just...No. Nevermind.

Deb Zahn: Smart ass.

Dr. Scott Thomas: So I would say this is a new world. That was an old world where things were different and there was money flowing in the area, and that makes it a lot easier.

Deb Zahn: Yeah. Agreed. I think we've run through a very good list of common mistakes. What to do instead. So hopefully this was helpful to everybody. Scott, I do have to ask you the final question, which is, how do you bring balance to your life? I know. If you listened to my podcast, you'd know I ask that question to everybody.

Dr. Scott Thomas: Goodness. Can I not say, or should I?

Deb Zahn: No. You've got to model good behavior for everybody, dude.

Dr. Scott Thomas: Well, very luckily, I have a great affinity for meditation. I meditate the heck out of my days.

Deb Zahn: You do.

Dr. Scott Thomas: And I have for a long, long time. It's sort of like a medical requirement to keep myself and others safe.

Deb Zahn: Community service. That's what you're saying.

Dr. Scott Thomas: Yeah, it's a community service. I meditate quite regularly as a community service and for world peace.

Deb Zahn: I think that's a great answer. Scott, thank you very much, darling, for being on the show with me.

Dr. Scott Thomas: It was lots of fun.

Deb Zahn: Thank you.

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 if 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 the 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.