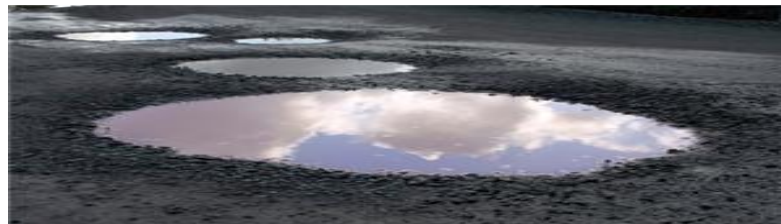


# Lessons Learned As Internal Consultants

## ‘How To Avoid Pitfalls & Potholes’



## Presenters

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# ASD Lessons Learned Agenda

Introductions & Overview

*Rule #1 – Stay Alive*

*Rule #2 – Start Where the System Is*

*Rule #3 – Never Work Uphill*

*Rule #4 – Innovation Requires a Good Idea,  
Initiative & a Few Friends*

*Rule #5 – Load Experiments for Success*

*Rule #6 – Light Many Fires*

*Rule #7 – Keep an Optimistic Bias*

*Rule #8 – Capture the Moment*

Small Group Work

Q&A/Comments/Closing



# RULE #1 – Stay Alive

- **HEALTH** – (no self-sacrifice; don't be self-destructive; love yourself; not just survival – use your whole being)
- **CLARITY** – (thoughtful risk – purposeful, timed, targeted; stay in touch with your purpose; use your skills, emotions, labels, positions rather than being used by them; turn yourself on and off, rather than being dependent on the situation; balance impulses by thinking about the consequences; capture the moment thinking about the future; scan the environment with the lens of your purpose)
- **STAY CENTERED** – (not trapped in people's games; go with the flow; live in several worlds without being swallowed up; dilemmas are opportunities for creativity; have a sense of humor)

# Rule #2 – Start Where the System is

- **LANGUAGE** – Don't use jargon – e.g., diagnosis, change agent
- **YOU ARE MARGINAL** – Start where the client is (empathy rule) but have boundaries; don't let the client become too dependent on you
- **SCAN** – understand the culture
- **COMMON GROUND** – establish rapport; establish a relationship before confrontation



# Rule #3 – Never Work Uphill

- **STAY CONSCIOUS** – Pay attention to resistance; use common sense; if you confront, make sure you have support; go where the energy is
- **STAY HUMBLE** – Understand that not all clients can be “saved”; don’t be a hero; don't work harder than the client
- **GROW** – Develop your own talent and potential



# Rule #4 – Innovation Requires ...

## Innovation Requires a Good Idea, Initiation & a Few Friends

- **INCLUSION** – Little can be accomplished alone; a change agent needs a partner; informal collaboration
- **BE SMART** – Create a critical mass of like-minded people who have passion; political acumen; adjust to what is happening in the moment



# Rule #5 – Load Experiments for Success

- Don't be afraid to experiment
- Build on strength; start with small wins
- Depend on volunteers



# Rule #6 – Light Many Fires

- Understand patterns of interdependency
- Believe in synergy





# Rule #7 – Keep an Optimistic Bias

- Be alert to the constructive forces which are often masked and suppressed in a problem oriented, envious culture
- Build on commonalities



# Rule #8 – Capture the Moment

- See the multiple potential of the moment
- Have multiple plans
- Use your head, your heart AND your experience



# Group Exercise:

1. Think of a specific example from work that you are currently struggling with or one that you recently had that did not result the way you wanted.
2. Think about what we just discussed in our presentation and see if you can determine a different way of approaching the problem.
3. Partner with another participant and briefly describe the situation and possible new approaches you could try, to get the desired result.
4. Now switch and with your partner and have them briefly describe their situation and possible new approaches they could try.



# RESOURCES

1. Rules of thumb for Change Agents – Herbert A. Shepard (1974)
2. Consulting on the Inside – An Internal Consultant’s Guide to Living and Working Inside Organizations (2000) – Beverly Scott

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