



Harness of the Power of Collaborative Excellence

## Finding the Right Advisor

*What you get will depend on how well you Define the Objectives*

*By Robert Porter Lynch*

*If you are vague about what you really want, you will most likely end up with the wrong advisor, but not realize it until long after the damage is done.*

*Five key questions are critical in choosing an Advisor:*

- 1. Is it Knowledge or Wisdom we need?*
- 2. Narrow Subject Matter Advisor or Leader with Holistic Perspective?*
- 3. Consulting Advice or Actionable Results?*
- 4. Specific Expertise or Building Competitive Advantage?*
- 5. What Roles are Appropriate?*

Having a grasp on these five issues will often be the determining factor in whether an early stage business is successful or fails. For mature businesses, the wrong choice can cost millions of dollars, in the long run. The following two pages will help you understand these issues and make the right decision.

Note: For simple requests (ideas, information or best practices, etc.) common sense says just go to a person with experience and know-how. Just do it. This paper addresses longer-term advisors for complex issues.

*Providing Full Spectrum Results to Collaborative Leaders,  
Strategic Alliances, Networked Enterprises & Value Chains*

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## Finding the Right Advisor

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### Question #1: Knowledge or Wisdom?

- ◆ The issue here is the first point of departure in your quest to find a good advisor. All advisors will come to you with a level of knowledge and experience.
- ◆ Most will claim to have had years of experience, but really may have had only 1 or 2 years of experience for 20 years. You can tell if they really have expertise by whether they were able to apply their expertise to ever more challenging, different, and complex situations.
- ◆ Still the real issue is whether you want someone with *knowledge* or *wisdom*?
  - A person with *knowledge* will have lots of *ready answers* around their subject. These are often referred to as *subject matter experts*. If you call a lawyer or accountant or even an IT professional, you will get such a person. For a narrow spectrum problem, a knowledgeable person may be the perfect answer.
  - On the other hand, an advisor with *wisdom* will undoubtedly have knowledge, but go far beyond, usually first having many questions signifying they also have:
    - deep compassion for you and your organization, understanding the *heart and soul* it takes to be successful.
    - a commitment to *execution & action*, knowing that every good idea only has value if can be implemented
    - a *coherent philosophy* about business that elevates the importance of leadership and people, while being committed to ethical creation of value.

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### Question #2:

#### Narrow Subject Matter Advisor or Leader with Holistic Perspective?

This question is really a corollary to Question #1

- ◆ Do you want someone with narrow expertise to solve a problem limited in scope and has been a very efficient manager during their career?
- ◆ Or does the situation demand someone who is a *systems “architect,”* who understands how strategy intersects with operations, how culture impacts employees, how growth embraces standards, and so forth. More than likely this person started their career as a manager, but became a *leader* in their field or organization, both as a thought leader, strategic leaders, and operational leader.
  - This person will help you design the *architecture* for your company, ensuring that your business doesn’t become a muddled agglomeration of adversarial and transactional thinking that can undermine your strength mixed in with the solid collaborative excellence.

## Question # 3

### *Consulting Advice or Actionable Results?*

This question gets to the question about whether you want a consultant or a coach. It's essential to know the difference.

#### ◆ Consultant

- Will either send in a team of many junior level new hires, or a solo individual,
- Analyze a Problem, then provide a recommended solution, leaving the implementation up to you.
- Typically, none of the people who are involved in having to implement the solution are engaged with the consultant, so those who have to produce the result may not even buy-into the solution. Often you'll hear these people say: "if that consultant know-it-all every asked me I would have told them how their solution wouldn't work."

#### ◆ Coach --we think of this person as a *Resultant*<sup>sm</sup>

- Will provide a senior executive (or senior team) to diagnose a Problem or Opportunity *with* your team,
- Examine the most effective and executable alternatives based on your strategic goals and capacity to implement, then either:
  - Catalyst-Coach helps you initiate a plan or program, or
  - Player-Coach taking an active role in implementing with or for you, and when involved in performance-based compensation, take co-responsibility for the result.
- Engage people who have to implement the Plan in its development and details of its implementation, understanding that "people support what they help create."

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Create a 25% Competitive Advantage

## Question #4

### Expertise or Competitive Advantage?

This question really addresses the long-term consequences to your company and links back to whether you need a narrow solution or solution that has a synergistic impact on the whole organization.

Put another way: some decisions are operational in nature and effect the *efficiency* of your business; and yet other decisions have impacts on your *competitive advantage* – decisions which have a lot of interconnected consequences along with your long term survivability

- ◆ A person providing *expertise* will generally only give you the best (most efficient) solution in their narrow field. So if you receive an IT solution, it may not have a favorable impact on marketing, operations, or supply chain management. The expert generally doesn't think holistically nor competitively.
- ◆ This is why it's imperative to have a firm grasp on the levers of what really creates sustainable success. All too often senior leaders get so wrapped up in the minutiae of operations, putting out fires, cutting costs, and administrivia, they have little time to wrap their heads around the most important thing – competitive advantage:
  - What do my customers really want and need?
  - What innovation will be necessary to stay ahead of the pack?
  - What will the winner look like in 3 years?
  - How do we create the most competitive (not necessarily lowest cost) supply chain?
  - How do we create the most productive and dedicated employees in the industry?
  - How can we create alliances that create a constant flow of new innovation/value?
  - And many related questions that, unless addressed, will result in decline.
- ◆ If you are not clear about addressing these issues, you can unintentionally get led into many traps.
  - For example, too many small businesses are told about risk management, and advised that a good lawyer and good accountant will give them the best advice. Not necessarily so. Too much emphasis on the legal aspects of contracts can drive great partners and collaborative leaders crazy, seeing litigation as the probable future in a business relationship. Such deals die before they are born.
  - Conversely a lawyer may tell you to load up a contract with legal consequences to protect you from a bad business deal, while the right advice would be “back off.”

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### Question #5

#### What Roles are appropriate?

You should give careful consideration to exactly what you want to produce for an outcome.

Some options include:

- ◆ **Advisor:** Provides Expert Advice, Knowledge, and Counsel
  - ◆ **Coach:** Stimulates & Builds a World Class Team
  - ◆ **Leader:** Takes Responsibility for Producing Results
  - ◆ **Communicator:** Gets an Important Message Across to People
  - ◆ **Catalyst:** Initiates Action, Provides Key Missing Elements
  - ◆ **Researcher:** Diagnoses Problems, Identifies Core Issues
  - ◆ **Facilitator:** Builds Bridges, Opens Pathways
  - ◆ **Trainer:** Imparts Knowledge and/or Skills
  - ◆ **Power Enhancer:** Creates Power (or neutralizes power) within the organization
  - ◆ **Implementer:** Puts program in place and takes responsibility, risk, and rewards for the results
  - ◆ **Capability Builder:** Trains Internal Teams & Staff to become highly effective, Establishes Organizational Functions, Generates Internal Support
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### Full Spectrum Diagnostics

Because so many consultants and consulting firms focused on their “niche” or “subject matter” or “specialized expertise,” you may easily be swept into a line of thinking that does not really address the core problems and obstacles you as a leader must resolve to get the results you want.

This is why any medium to long term engagement must embrace a strong set of diagnostics that cut through the clutter, focusing on root causes, and key leverage points for change.

Together, Paul R. Lawrence, Professor of Organization Development at Harvard Business School, and Robert Porter Lynch developed the Lawrence & Lynch diagnostic framework: a proprietary algorithm for analyzing causation, not symptoms, and leverage points for correction.

We also have an excellent “Health Check” methodology that enables organizational leaders to see quickly how their internal organization is functioning. Additionally, we do an external Health Check designed for Customers, Suppliers, Marketing Channels, and Alliance Partners.