

## **WHAT IS BUYING FACILITATION® - THE THEORY AND THE BELIEFS**

### **FACILITATING THE DISCOVERY PROCESS WITH CLIENTS**

Our job is to help our clients find their best answers. We work hard at understanding what they need, what will solve the problem. We study the problem and all of its ramifications, call a colleague or two to discuss it fully, and come up with a solution that we think will fix the problem. We understand it's our job to offer the support and information that will lead the customer to his/her best solution.

Sometimes it's a piece of cake: it all works just as it should. The client agrees, rallies internal support, and helps get our ideas and solutions to meld with theirs, and helps us get the solution implemented. We collaborate over time. Change happens.

But sometimes, it doesn't work at all: the client does something different than what was discussed; or doesn't call us back; or gets annoyed; or comes up with some internal mayhem that sabotages all the work we've done.

At those times, what stops clients from listening to us? Heeding our advice? Why do some clients stop calling rather than continue using us for ongoing projects? And just where do they find all of those new staff and stakeholders who suddenly offer input that renders our solution obsolete?

What's happening? Take your pick:

- you didn't get systemic buy-in and work only with the identified client and his/her team;
- you delivered your sage advice using your favored communication patterns;
- you based your solution on what might indeed be the correct, rational thing to do but based it solely on information.

What sometimes happens is that we are brought in to clean up a piece of a much bigger pie. We are presented with facts, work with the facts, and use the facts as the basis from which to move forward. But sometimes the client doesn't initially grasp the far-reaching effects of what our solution would do to their cultural norms and beliefs and values. They didn't realize until too late the assault our solution would produce on the entire organizational system, on specific egos or historic relationships, not to mention future ones. They didn't appreciate what havoc change would deliver.

### **SELLING VS. FACILITATING**

Historically, we have used the information — data, content, facts and details — of the presenting problem as the basis on which to consider solution possibilities. However, information is not the vehicle with which to solve problems. We can have all the information in the world about a client problem, but unless the client understands how the problem resides within its culture, norms, beliefs, and systems, they don't have the ability to create a solution.

By using information as the basis upon which to help clients find answers, we are forsaking our pivotal roles as neutral navigators - a job that not only facilitates discovery, but also assumes responsibility to direct clients toward amassing, and making sense of, all of the necessary cultural criteria that goes into a congruent outcome.

When we do not fully comprehend that our role is that of guide, and when we try to have answers, what we end up doing is sales job — selling the client on our solution. We then end up using our selling patterns — how we position our conclusion - rather than supporting the buyer's buying patterns — the unique way any protected culture will unite to solve their problems. In other words, we re-run the risk of doing it our way rather than teach the client how to meet the standards and expectations that her environment embraces.

Let's take a look at the difference between selling a client on our ideas, or facilitating them in discovering the parameters of their solution.

So long as we are operating out of our beliefs, our information, or our favored communication patterns (not to mention our need to be right), we will burn up those clients who do not match the way we view their world.

The reality is, buyer's buy (ideas or products) only when they clearly recognize that what they are doing isn't working, AND when they can't fix the problem themselves, AND when the solution fits into their cultural norms comfortably. Period.

The trick is to teach the client how to make decisions in his own world, based on the criteria that exist in his unique culture, using our expertise as one would use a lightning rod, to illuminate the places where the answers might lie. The hard part, as a consultant, is to truly understand that we indeed don't have the answers, can't create a solution, and are hired just to be a facilitator.

I once did a consulting and training job at a large health-care supplier. The job was problematic, in that we were doing a pilot project that would have high visibility and major ramifications on their bottom line and on the way they ran their sales organization. I spent a huge amount of time with the senior people prior to the program, gathering information, creating relationships, walking them through the types of changes that would occur, and got buy-in to make the changes.

When I implemented the program, and the results were just as expected, the lid was blown off the organization:

- The people I trained became six times more successful than their colleagues. How could they pay the course participants differently than their colleagues?
- The course participants needed continued practice with their new skills. Who would supervise these new skills?
- The course participants ended up with mountains of additional paperwork due to their increased activity. Why did this group deserve additional administrative support when the rest of the staff had been asking for additional help for years?

There was such loud political fall-out that the success we garnered was moot. Within 2 months the group I trained was redeployed, rather than working toward finding a way to help these folks fit into the larger culture — not to mention finding a way to change the larger culture.

Imagine the amount of avoidance of change and confusion it had to take to renounce a 600% increase in their sales rather than change their system!

At the time I thought I had done my job: give them good consultancy in re: the change and chaos process, tell them what problems would occur and how to alleviate them, and increase their revenue dramatically through the training. Although I tried to introduce all of the expected systems problems prior to the training, I had not ensured that THEY understood the systems problems within their unique culture. I had assumed:

1. that the huge increase in revenue would more than make up for any discomfort and in fact spur them on to change in order to reach the new revenue capability;
2. that the discussions I had with them about the ensuing chaos would have been understood *because I said it*;
3. that the promises they made to me prior to the training would be upheld.

What I forgot to do was to make sure THEY knew how all of the chaos and necessary changes would fit into their system and that their colleagues and stakeholders shared the same view. I hadn't taught them how to align their new beliefs and behaviors into the old in order to have both new and old work as a congruent whole. I hadn't used my function to help them align all of the cultural norms and rules and presuppositions and history and politics. I had been basing my consultancy on

1. information;
2. knowing my job;
3. helping them find their best answer in my area of expertise;
4. the assumption that the presenting problem was the basis of the whole picture.

I believed my job was to help them find their own solution with the aid of my training, but I didn't fully comprehend the full extent of what it took for my client to meld and reorganize and align thinking among his different groups. I didn't understand that the most important thing that had to happen was to help them all recognize their unique perspectives and work through their decision processes on what they would need to know or do or believe differently in order to line up behind chaos and change.

Believing that I had right and increased revenue on my side — two inducements to ensure the client would support the change process — my client and I barreled forward, leaving a wake of angry people who hadn't bought into a change scenario — people who hadn't been brought into the equation initially as they were not deemed part either of the Problem Space, or part of the management, or even involved in the areas of change I was working in. Not only did I not know these people should have been included, my client didn't know they should have been included. But there they were. At the time I considered them saboteurs.

I could have facilitated my client into appreciating the ground work that had to be completed prior to the program **BASED ON HIS RELATIONSHIPS AND POLITICAL STANDING**, not on my personal understanding of what needed to take place. My client also had to know how to discover and align all of the hidden factions, and ultimately get them on the same page as we were before we moved forward. This was no easy task, since there was no way, initially, to know who these people were. In my eyes, I was working with the staff, management and VPs of the training and sales departments. They had hired me, were paying me, and had agreed to become part of a team to implement change and handle chaos.

What we didn't know was how forceful the adjacent departments would be in reacting to the change. We also didn't know that we were supposed to bring these disparate groups into the process.

## **WHAT WE DON T KNOW**

When we enter a client site, we spend time learning about their presenting problems and what caused the problems. What we don't know is their system, their cultural norms, their company politics. We can't ever know these, since we don't work there and are not privy to the secrets and politics and relationships that underlie the obvious.

Until now, as consultants we've prided ourselves on knowing all that we can know about the information in our field of expertise. Our clients had rather simple systems: there was a hierarchy of management; departments ran the company; they expected to earn money on their product or service.

It's all changed. Not only can we not know all the information in our field, we can not know what is going on in the client's complex system. Their management structure might shift daily; departments shift people, outcomes, products; their vendors/suppliers and your competitors may be alive and well within the company, working with or against each other; their products may be shifting, or sold off, or added to via a merger. There is currently too much information that we cannot know.

For example, do you know

- how clients will handle any cultural issues around bringing an unfamiliar solution into their midst?
- if clients understand exactly what would need to change in all parts of their system when working in a new way?
- if clients will know how to realign their practices to make sure their political systems remain intact during and after your suggestions are adopted?

In order for anyone to do anything different from what they've done until now, the following criteria must be met:

1. the customer must know exactly what's missing and how it got that way. The decisions that created situation that brought you into the company have to be re-examined or the client won't know how to do anything different.
2. the customer must understand, and understand deeply, that the resources they have on hand — the staff, department personnel, vendors/suppliers they've used in the past — are not the resources that will fix the problem they are facing.
3. the circumstances the customer operates out of must be able to adapt to suggestions by the consultant. Not just one piece of the organization — the whole client system needs to adapt.

## WHAT TO DO?

Since our basic job is to be change agents, selling solutions and change and information and systems to our clients, we must be willing to change ourselves. Without flexibility, we will only be successful with those clients whose buying patterns are similar to our selling patterns, and lose those clients who we cannot match.

Indeed, we need an additional skill set to assist our clients and prospects in understanding those pieces of their system that need to be aligned from within, prior to them agreeing to bring our solution in-house. It's not enough that we have answers. It's not enough that we have a good understanding of the problems. *The client* must have the comprehensive understanding of their systems, and how it needs to align behind change.

So, first of all, we need the belief that it's our job to serve the client, not to have the answers. Then we need the skills to help them discover all of the disparate pieces that need to be brought into the decision.

Since much information of this type is spread around an organization rather than in the heads of the people we are working with, our clients would not necessarily know to direct efforts to people working outside their areas. And there is no way we can know where the pitfalls lie.

There is a type of question, called facilitative questions, which will direct a client's thinking and help them begin to align all of the cultural norms and stakeholders necessary to have a successful outcome.

These are not information gathering question that will give us information to use in order to assess the client s needs. These are not open questions, nor are they closed questions. They are questions that use our expertise as consultants to direct the thinking process in search of criteria-based answers, rather than information-based answers. After all, having information doesn t help in aligning people and uncovering their private misgivings.

First let s take a closer look at the areas that must be examined.

1. What s missing and how did it get missing? Until people understand how they got where they got, they won t know how to change.

Example: If a company has taken the decision to only use internal consultants, they won t bring in an external consultant. If they understand that the decision to not use internal consultants was made 4 years prior when the company was going through a rough patch, and on examination the directive is now moot, there is a new basis for decision-making.

2. How can clients fix it themselves? It s human nature to do whatever it takes to make what you ve got work. It s easier and cheaper. Before an organization will accept an outside resource coming in a causing havoc, they have to take on board the belief that they need help. All areas of current support — internal groups, vendors, suppliers — must be examined to see if they can supply the fix without bringing any new (us included) into the equation.

Example: If a company is experiencing an interdepartmental problem, they will first sit the people in the departments down for an airing of their problems, accompanied by agreement points toward a solution. They will give this solution a period of time to see if it ll solve the problem. If not, they will go to other departments for ideas. Then to current vendors. If all else fails, they will call in an unknown consultant. Time elapse? Anywhere from 1 month to 6 months. Of course, if a consultant came in right away, the problem might have been solved that much sooner.

3. What are the systems issues that must be taken into account before their culture will do what it takes to support change? What historic games or norms or values must be adhered to in order for the people to be willing to do something different? Until there is the understanding that whatever issues need alignment will be addressed within the norms of the culture, change won t happen.

Example: A team is ready to bring a new product to market. They need additional resources to give them a hand, but seem unable to get agreement from management to move forward. A consultant is called in to take a look at the options, and understand why the process is coming to a halt. The consultant works with the manufacturing team, has conversations with the EVPs, fine-tunes some of the systems. There isn t much of a change. Then it comes out that a strategic merger is about to happen — a merger that had to remain secret for legal reasons.

## QUESTIONS

All of the above problems could have been solved more quickly if the consultant asked questions that would teach the buyer how to systematically make sense of her environment.

Remember: people change using their own cultural norms and beliefs and internal systems to decide from. When we can support our clients in aligning all of the norms and beliefs and systems that must be aligned in order to make a change, they are able to reduce their decision-making time to a fraction. Not to mention, operate out of a unified community.

Here are some examples of questions that would facilitate discovery (note: they are criteria-specific, not information-specific):

- What would need to happen differently for you to use your in-house teams to solve the problem for you? or
- What is stopping you from fixing that yourselves?
- What issues would need to be addressed for you to bring in additional resources to your team? or
- How would you need to work with your colleagues in order to be comfortable bringing in additional resources and integrating them with your team?
- What cultural norms must be maintained to have chaos be kept at a minimum?
- What other departments or stakeholders are in any way touched by your team and need to be brought into any decision you make?

These questions do the following:

1. require an action — to answer the question the client needs to make some sort of decision;
2. start with how or what, never why — why comes from judgment and creates defense;
3. bring together educating and discovery and solutions — the we can teach our clients how to think about the areas they need to consider while not knowing how the answers stack up in their culture;
4. become true consultants — having the questions, not the answers.

By using these types of questions to facilitate discovery you take yourself out of the consultant's job and into the facilitator/navigator's job and truly become a servant for the customer.

But we have to get out of our heads, into our heart, and away from being right to serve.

## **PROGRAM OFFERINGS FROM MORGEN FACILITATIONS, INC.**

Based on a system that teaches collaborative communication, decision-facilitation, and strategic thinking, we are offering the following programs:

1. **Buying Facilitation:** a new paradigm sales process that uses facilitative questions to help buyers align all of decisions they need to consider to make a purchase;  
For: all sales personnel (including face-to-face, telemarketing, team sales, strategic planning groups), sales managers, marketing personnel
2. **Customer Service:** teaches service providers the questions to ask that help buyers to decide exactly what will satisfy them and how to reach a win-win solution;  
For: all customer service reps, help desk personnel, inside sales reps
3. **Technical communications:** teaches technical staff to gather appropriate data during the initial meeting, and how to know if all relevant data has been captured;  
For: all technical people, including software developers, programmers, systems designers, analysts, team leaders
4. **Team- and Partner-communication:** helps each person in a group learn how to communicate collaboratively to enable
  - a) Focused, efficient meetings;
  - b) Win-win outcomes with buy-in from all sectors;
  - c) Negotiation tools to handle potential problems;
 For: all company personnel who work with other departments and other people
5. **Coaching:** teaches decision-facilitation strategies that create alignment between employee and supervisor, senior management and staff.  
For: all people who have staff reporting to them.