

WHETHER TO USE AN INTERNAL OR EXTERNAL CONSULTANT?

It is sometimes difficult to choose whether to use internal expertise or to use an external consultant to facilitate a meeting. One view is that the entire project, including facilitation of decision making processes, be controlled by the internal group making the decision – external consultants might act only as a temporary guide in this situation.

Another view states that if the task is sufficiently complex it is best to use external consultants or facilitators with content expertise and free of bias and preconceptions - external experts who will not be able to unduly influence the decision making process.

Which do you choose? Examining the situation along the following nine dimensions can help you make that decision.

1. Distrust or bias

In situations where distrust or bias is apparent or suspected, groups should make use of an un-biased outsider to facilitate (and perhaps convene) the group.

The individual whose job is to manage the process -- typically the chairperson or team leader -- has an enormous influence on the process and, consequently, the outcome. This person's choice of participants, analytical methods, and methods of social interaction influences the group effort at a fundamental level. Because of this, group members might view this leader as biased -- steering the process in some way to promote his or her own agenda. True or not, this perception can greatly hinder the process.

2. Intimidation

The presence of an outside facilitator can encourage the participation of individuals who might otherwise feel intimidated.

Where participants are of disparate educational, social or economic status; are at different hierarchical levels; or are in other types of control relationships (such as purchaser-supplier or client-provider) some group members might feel intimidated and not participate. The presence of a facilitator can give participants someone of neutral status to whom they can direct their comments without fear. The facilitator is in a legitimate position to elicit information from the group as a whole, as well as from specific individuals who are not forthcoming. In particularly tense circumstances, the facilitator might choose to elicit information anonymously.

3. Rivalry

Rivalries between individuals and organizations can be mitigated by the presence of an outside facilitator.

Participants are typically reluctant to reveal personal rivalries or attack one another in the presence of an outsider. (Perhaps they realize that their claims might not appear valid to an outsider, and so do not even raise them. Participants are often surprised at how polite they are to each other.) But, if rivalries do surface, a facilitator can determine if they are relevant to the task at hand. If they are not, the facilitator will refocus the group on its stated purpose. If they are relevant, the facilitator will ask the group to understand them as part of the issues to be addressed.

4. Problem definition

If the problem is poorly defined, or defined differently by multiple parties, an unbiased listener and analyst can help to construct an integrated, shared understanding of the problem.

When a group represents disparate views, members are often more concerned with having their point of view understood by others, than understanding others' views. An unbiased party, one who does not

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advocate any particular position and whose role is to listen to, analyze, and integrate everyone's views, is a valuable asset to such a group.

5. Human limits

Bringing in a facilitator to lead the group process lets members focus on the problem at hand, which can lead to better results.

In difficult situations, working with the breadth of issues and volumes of important information is demanding enough; it is too much to expect anyone to also manage the processes that come into play in a meeting. Human cognitive capabilities are not great enough. Running a meeting, and participating in a meeting, are each sufficiently demanding to warrant having the facilitator focus on the former and the group on the latter.

6. Complexity or novelty

In a complex or novel situation, a process expert can help the group do a better job of working together intellectually to solve the problem.

Process expertise requires judgment, practical skills, and in-depth knowledge of problem solving and decision making. Most groups have developed their own expertise for addressing ordinary problems or making repeat decisions. When approaching an unusual situation, however, a group can benefit from an expert for whom this particular problem-solving situation is familiar.

7. Timeliness

If a timely decision is required, as in a crisis situation, the use of a facilitator can speed the group's work.

If participants have to make process decisions as a group, they take valuable time away from addressing substantive issues. Unlike parliamentary procedure, for which there are prescribed rules which address nearly every procedural issue that a decision-making group can encounter, there is no rule book for collaboration. Instead of making up the rules as they go along, groups can adopt the rules of a process expert. The expert acts as a group process parliamentarian -- choosing which rules to apply, explaining them as needed, and steering the group through the process.

8. Cost

A facilitator can help the group reduce the cost of meeting -- a significant barrier to collaboration.

Participants might be reluctant to attend meetings because of competing demands on their time, doubts about the amount of progress they will be able to make, or travel costs. By making each meeting more efficient and productive, a facilitator can reduce the overall cost in terms of participants' time. Because more is accomplished at each meeting, the total number of meetings might be reduced.

9. Capability

An expert consultant can bring additional capability, knowledge, skills and experience to the table.

External consultants and facilitators with content expertise are able to bring additional experience, information and perspectives to the project or meeting, especially if that knowledge and experience is lacking internally. Having had previous experience in similar situations, they can save valuable time and help maximise use of limited resources. There are also times when even if an organisation has the internal expertise, they do not have the available human resources to allocate to the project.

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Internal vs External Consultant

1	2	3	4	5	6	7	8	9	10
interpersonal trust				distrust or bias		suspicion			

1	2	3	4	5	6	7	8	9	10
low status differential				intimidation		high status differential			

1	2	3	4	5	6	7	8	9	10
low competition				rivalry		high competition			

1	2	3	4	5	6	7	8	9	10
well defined, held in common				problem definition		poorly or differently defined			

1	2	3	4	5	6	7	8	9	10
low demands				human limits		high demands			

1	2	3	4	5	6	7	8	9	10
simple or familiar situation				complexity or novelty		complex or unfamiliar situation			

1	2	3	4	5	6	7	8	9	10
no rush				timeliness		pressure to solve quickly			

1	2	3	4	5	6	7	8	9	10
easy to get together				cost		difficult to get together			

1	2	3	4	5	6	7	8	9	10
high content expertise				capability		poor content expertise			

A higher score suggests that the role of consultant should be clearly differentiated from that of client and that an external consultant or facilitator should be used.

Although the above dimensions are listed separately, in practice they must be addressed as a whole when making the decision. Each project and/or meeting will be unique.

Adapted from an article by Sandor P. Schuman which appeared in Chris Huxham, ed., *The Search for Collaborative Advantage*. London: Sage.