Purpose, Origins, and Preview: Communication Studies Consulting

Project purpose:

There are several factors which motivated this senior project: (a) an empirical interest in the real-world processes and methodologies of organizational consulting as a field of professional practice in our increasingly business-oriented society; (b) a desire to understand the field itself more deeply in terms of its philosophical and attitudinal assumptions that underlie it, its culture, and how interpersonal and institutional relationships within the field are structured; and (c) a particular interest in understanding the ways in which an undergraduate education in communication studies serves to prepare individuals for working in the professional field of organizational consulting. Ultimately I intend to pursue a career in organizational consulting. Therefore, based on the belief that cognizance is most effectively fostered when theory is linked with practical situations, this project (with both theoretical and applied portions) serves to enrich my understanding about the vicissitudes of organizational consulting while simultaneously preparing me for working in this field.

Throughout this project I most notably draw influence from Schein's (1969, 1988, 2009) behavioral models of organizational consultation (purchase-of-expertise, doctor-patient, and process). I reference his theories to design a mock interaction between an agency seeking organizational consulting services and a communication consulting specialist. This interaction is carefully constructed to represent a realistic client-consultant project bidding process. I premise this correspondence upon considerations of many pertinent organizational communication and persuasion concepts, as well as insights gained thorough my analysis of various case studies, articles, and testimonials from within the consulting industry. To add clarity and scholarly merit, supplementary explanations and theoretical elucidations are offered to accompany these professional interactions.

To convey the hypothetical company's needs in a professional manner that is representative of typical correspondences of this kind, as my first undertaking I develop a request for proposal (RFP) document. A RFP for consulting services is a formal solicitation made by an agency or company interested in procurement of information and/or services to potential consulting suppliers. A RFP functions to elicit proposals from suitable applicants while simultaneously discouraging responses from those who lack the necessary qualifications. The purpose of a RFP is to engage the consultant's interest, enable them to assess their own fit with the project, and stimulate creative approaches to the challenge (Damian and Kelly 42).

The RFP I deliver contains three cases, each presenting a separate organizational challenge for which the mock company is requesting information and/or services from a communication consultant. Each challenge is constructed to correspond with one of Schein's three consulting models and is representative of typical organizational challenges that communication consultants address in the business world. The RFP includes the following elements: a cover sheet, an introduction to the company and the project, a description of the project background (for each organizational challenge), the scope of work (for each organizational challenge), specifications for deliverables (for each organizational challenge), guidelines for applicant responses to the RFP, evaluation criteria, and budget.

As my subsequent task, I construct a proposal in response to this RFP. This document outlines my plan (as the consultant) to address each of the three organizational challenges presented by the hypothetical company in the RFP. In order to develop well-thought-out proposals for each of the company's unique challenges, I employ Schein's organizational consulting models, along with additional organizational communication and persuasion concepts to help guide my responses. In many ways this proposal resembles a response to an ordinary help-wanted ad. Accordingly, like with any job application, a central aim of this response is for the consultant to establish credibility in the eyes of the employer/client. Thus, in my response to each organizational challenge I include a hypothetical “experience” section to establish the consultant’s credibility. This portion draws influence from *credibility theory* and other “source factors” which are taught in Cal Poly’s Persuasion (COMS 322) course.

With such a wide spectrum of approaches and disciplines among professional consulting occupations, an important objective of this project is to explore underlying theoretical principles that generally influence the field of organizational consulting. As Schein (1988) emphasizes, understanding theoretical assumptions that underlie the various approaches to consultation is critical to understanding the broader concept of organizational development (1). In this project, theoretical insights are offered to accompany the professional correspondences with which they correspond in the RFP and response to the RFP. Therefore, this project not only serves as preparation for working as a professional consultant, but also contributes to the existing body of literature concerning organizational communication, development, and consultation.

Project origins:

The origins of this project are predominantly rooted in organizational communication. Cal Poly’s Organizational Communication (COMS 213) course teaches a wide spectrum of concepts regarding the organization and its communication behaviors. I utilize many of these concepts, either explicitly or implicitly, to inform the context of my RFP and my proposal in response to the RFP. As defined in the COMS 213 textbook, “Organizational communication as a discipline seeks to help people understand the central nature of communication in all aspects of the organizational functioning" (Modaff, DeWine, and Butler 2).

A portion of this course is dedicated to informing students about the organizational consulting business, as it is typical for communication studies graduates to enter into this professional field. Schein's three behavioral models of consulting are a central focus during this section of the course. His theories provide a framework for understanding the primary goals, processes, and situational requirements that a communication consultant must be aware of in order to make appropriate judgments about how to precede in a given consulting project. Exposure to Schein's consulting models and the organizational consulting profession inspired me to learn more about these topics.

It is generally accepted that the professional practice of consulting first appeared towards the beginning of the twentieth century, when Frederic Tailor first published his treatise on Scientific Management in 1911 (Kakabadse, Louchart, and Kakabadse 419). Greiner and Metzger (1983) define organizational consultancy as "an advisory service contracted for and provided to organizations by specially trained and qualified persons who assist, in an objective and independent manner, the client organization to identify management problems, analyze such problems, recommend solutions to these problems and help when requested in the implementation of solutions" (7). Yet as the literature suggests, there are many different schools of thought regarding the role of organizational consultants. Argyris and Schön (1996) and McKinley and Scherer (2000) perceive consultants as agents of change and assert that consultancy is a process through which organizations learn. Lippitt and Lippitt (1986) propose that there is no established role in consultancy because consultants must fulfil a number of roles depending on the client's situation. Alternatively, Schein focused his research on the role that "consultation process" plays in organizational development.

Schein began developing his comprehensive concept consisting of pragmatic consulting roles in 1969. Schein (1969, 1988, 2009) suggests that there are three types of consultation: (a) the expert-resource-role: the consultant is expected to provide information and/or service; (b) the doctor role: the consultant diagnoses the organizational issue and prescribes a solution; and (c) the process consultation role: the consultant collaborates with the client to focus on the communication process and on how organizational problems are solved. His lasting framework has helped consultants to define their purpose and relationships with clients in a variety of situations. These three roles are all based on different assumptions and have different consequences on the relationship. Schein (1988) emphasizes that the consultant chooses the nature of the relationship they will have with the client. He sees consultants as capable of playing each of the three roles and shifting roles as the situation demands. However, for the purpose of this project I demonstrate how Schein's three consulting roles/models operate in isolation. This is accomplished by constructing each organizational challenge and response to align most closely with the underlying theoretical and attitudinal assumptions of *one* of Schein's three roles/models.

In addition to foundations which draw influence from *credibility theory* (found in persuasion discourse) along with various organizational communication concepts, the professional correspondences presented throughout this project are constructed in light of themes that emerged out of my review of literature from within the consulting industry. Findings from my analysis of various case studies, articles, and testimonials from consultants influenced the structure of the RFP, the nature of the three organizational challenges presented in the RFP, and the approaches exemplified in the proposal submitted in response to the RFP.

The central components provided in the RFP are representative of the most commonly incorporated elements in real-world RFPs. These include a cover sheet, introduction, project background, scope of work, specifications for deliverables, response to the RFP, evaluation criteria, and budget, (Damian and Kelly 43). In the RFP I describe a strategic public relations (PR) challenge to illustrate Schein's purchase-of-expertise model, a human resources (HR) challenge that exemplifies the doctor-patient model, and an operations/information technology challenge involving globalization and virtual communication to demonstrates the process consulting model. Collectively these cases embody all four realms that Tony Letrent-Jones (2001) recognizes as the most common categories for the practice of consulting to fall into including: (a) strategy, (b) operations, (c) information technology, and (d) human resources (96).

I chose to first highlight a PR challenge because of the prevalence of PR consultancies along with this discipline's theoretical foundations rooted in communication studies. Botan and Taylor (2004) note that "Public relations is both a professional practice and a subfield of communication with its own research and theory base" (645). For the second challenge I chose to describe a HR challenge because of HR-related theories' pervasiveness in Cal Poly's Organizational Communication course curriculum and generally within the organizational communication discipline. Lastly, I include a challenge involving virtual teams because of this area's implications for organizational communication currently and in the future for our increasingly globalized society.

Project preview:

[Sections highlighted in blue indicate supplementary explanations to offer context for the corresponding organizational challenge or proposal;

Sections highlighted in yellow indicate theoretical elucidations of Schein's theories for the corresponding organizational challenge or proposal;

Standard/non-highlighted text is used for all professional correspondences (applied portions)]

Request for Proposal

I. The RFP, introduction to the reader

II. Introduction to the hypothetical company (i.e. Malcolm Media) and the project for which the company is issuing the RFP

III. Overview of the organizational challenges

- Purchase-of-expertise case: PR challenge
  - a. Explanation to the reader, PR case
  - b. Theoretical underpinnings, purchase-of-expertise model
  - c. Project background
  - d. Scope of work
  - e. Specifications for deliverables
- Doctor-patient case: HR challenge
  - a. Explanation to the reader, HR case
  - b. Theoretical underpinnings, doctor-patient model
  - c. Project background
  - d. Scope of work
- Process case: globalization and virtual communication challenge
  - a. Explanation to the reader, globalization and virtual communication case
  - b. Theoretical underpinnings, process model
  - c. Project background

d. Scope of work

IV. Response to RFP

V. Evaluation criteria

VI. Budget/Cost Projections

Proposal Submitted in Response to the RFP

I. Theoretical underpinnings, communicator credibility

II. Proposals in response to challenges described in RFP

1. Response to purchase-of-expertise case: PR challenge
    a. Explanation to the reader, response to PR case
    b. Theoretical underpinnings, the expert resource role (purchase-of-expertise model)
    c. Recommendations/scope of services
    d. Experience
2. Response to doctor-patient case: HR challenge
    a. Explanation to the reader, response to HR case
    b. Theoretical underpinnings, doctor role (doctor-patient model)
    c. Recommendations/scope of services
    d. Experience
3. Response to process case: globalization and virtual communication challenge
    a. Explanation to the reader, response to globalization and virtual communication case
    b. Theoretical underpinnings, process consultant role (process model)
    c. Recommendations/scope of services

d. Experience

Project conclusion

Malcolm Media Corporation

Request for Proposal

Consulting Services for Three Diverse Organizational Challenges: Corporate Anniversary Campaign, Excessive Turnover, and Productivity Optimization of Multinational Teams

03/2/2014

I. The RFP, introduction to the reader:

A RFP for consulting services is a formal document constructed by a company that functions to elicit proposals from suitable applicants while simultaneously discouraging responses from those who lack the necessary qualifications. Therefore, in many ways a RFP resembles any ordinary help-wanted ad. The purpose of a RFP is to engage the consultant's interest, enable them to assess their own fit with the project, and stimulate creative approaches to the challenge (Damian and Kelly 42).

The RFP often plays a significant role in expediting a consultant's decision to bid (prepare a proposal) for a particular project. Consultants usually have to put a lot at stake when they decide to bid for a particular project. Often, constructing a compelling proposal in response to a RFP requires a great deal of time and effort on the part of the responding consultant. For this reason, the agency should also take seriously the task of developing a high-quality RFP that accurately presents the company, the nature of the challenges, and the full scope of services desired.

In his book *Organizational Entry: Recruitment, Selection, Orientation, and Socialization of Newcomers* (1992), Wanous introduces the theory of *realistic recruitment*. According to Wanous, realistic recruitment "presents outsiders with *all pertinent* information *without distortion*" (43). Central to the theory of realistic recruitment is the creation and use of a *realistic job preview* (RJP). An RJP is "an attempt by the company to provide an accurate (both positive and negative) view of the relevant aspects of the job and the organization" (Modaff, DeWine and Butler 141). Modaff, DeWine, and Butler note that RJPs function to provide a candidate with an opportunity to self-select themselves in or out of the applicant pool on the basis of their match or mismatch with the position (142). They suggest that the remaining pool of applicants should consist of people who believe that there is a good match between their needs and skills and the demands of the job (142). In line with the purpose of realistic recruitment theory, a company's RFP should embody a RJP to accomplish what it intends to do (i.e. elicit proposals from suitable consulting candidates).

According to Damian and Kelly, a formal RFP will typically include the following elements:

- A cover sheet: The cover sheet should at least state the name of the company, name of the project, and the date in which the RFP is issued.
- Introduction: The introduction should identify and briefly describe the company, and the project for which the company is issuing the RFP.
- Project background (for each organizational challenge): The project background serves to provide context for the project and should more readily enable consultants to provide meaningful responses.
- Scope of work (for each organizational challenge): A description of the scope of work should provide an overview of the work to be performed and help the consultant judge the level of effort required for various tasks.
- Specifications for deliverables (for each organizational challenge if relevant): If the contracting agency has specifications for deliverables they should communicate these needs in the form of deliverables.
- Response to RFP: The RFP should include a statement of the elements that should be included in the applicants' response to the RFP.

- Qualifications: The company should explicitly request that applicants communicate their qualifications in their response to the RFP.
- Evaluation Criteria: The RFP should contain a section explaining how proposals in response to the RFP will be evaluated in general terms.
- Budget and cost projections: The client should either provide a budget that the consultant must adhere to or request that the consultant offers cost projections for their proposed information and/or services.

II. Introduction:

Malcom Media is a multinational media company headquartered in Los Angeles, California. Since the company's founding in 1964 it has been privately owned and operated under the Malcom family. Malcolm Media opened an office in Australia in 2008 and recently opened a UK office in June 2013. Today Malcom Media owns 36 radio stations, four television stations and two magazines.

The intent of this RFP is to identify and engage an independent and qualified Communications Consultant to address the following organizational challenges for Malcom Media Corporation:

- Complete a series of tasks concerned with rolling out a successful 50th anniversary campaign to promote our organization.
- Assess the viability of new management at our KTSF station and identify the source of recent spikes in employee turn-over rates at this office to recommend a plan for addressing this issue.

- Work with our Los Angeles-based management team to provide guidance for the development of effective and sustainable strategies aimed at optimizing collaboration among multinational virtual teams.

III. Overview of challenges:

1. **Malcom Media needs a provider to complete a series of tasks concerned with rolling out a 50th anniversary campaign to promote the organization.**

   a. **Explanation to the reader, PR case**:

The following scenario represents a PR challenge. As previously noted, there are many shared theoretical and attitudinal underpinnings among PR and communication studies disciplines (White, 2002). Both share common aims involving, informing, positive image management, persuasion, and inducing action through communication. Botan and Taylor (2004) define PR as a field centered on “building relationships with publics that constrain or enhance the ability of the organization to meet its mission (652).

Accordingly, the knowledge and skill required for a qualified PR practitioner suggests a broad education which provides exposure to research, management, communication and cultural studies (White 6). Courses offered in Cal Poly’s Communication Studies program such as Organizational Communication, Persuasion, Research Methods, Intercultural Communication, etc. demonstrate affinity with these types of educational values. Botan and Taylor (2004) propose that PR has become much more than just a corporate communication practice. Rather, they deem PR a “theoretically grounded and research-based area that has the potential to unify a variety of applied communication areas and serve different types of organizations" (659).

This organizational challenge is structured in light of my review of various PR consulting case studies. Because most PR challenges are focused on promoting an organization's positive image, instances in which PR consultants are sought to handle corporate anniversary programs are common. The following proposition motivated the central objectives of this challenge "A successful corporate anniversary program should: (a) boost employee morale; (b) launch special promotions to increase sales; (c) strengthen relationships with dealers, suppliers and customers; (d) update the company image; and (e) improve relations with the surrounding community" ("How to Run a Corporate Anniversary Program").

Throughout the development of this case I also considered the theory of *organizational culture*. Modaff, DeWine and Butler propose that organizational culture is "a byproduct of organizational activities; as organizations produce goods and services, they also produce cultural artifacts, such as stories, rites and rituals, and heroes" (92). In this sense, Malcolm Media's 50th anniversary can be viewed as contributing to the company's organizational culture. For example, Malcolm Media's 50th anniversary gala (part of their anniversary campaign) is a larger more public event/celebration which exemplifies what Modaff, DeWine and Butler call an organizational rite or ritual (92).

b. Theoretical underpinnings, purchase-of-expertise model:

In the purchase-of-expertise model the level of interaction between the client and the consultant is moderate (Schein, 1969). Interaction between the two parties is less involved than in the doctor-patient and process consulting models. The client (the manager, the organization, the department) individually (without assistance from the consultant) identifies a need within the system, based upon a diagnosis conducted within the system and by the system (Goldhaber 325). The client then approaches a consultant to implement the solution by purchasing specific information and/or services to meet the organization's needs. Thus, Schein (2009) describes that the consultant is often perceived as playing an "expert resource role" for the client. The expectation placed on the consultant is clearly defined by the client before the onset of the job. The consultant's objectives are to develop in a linear sequence (Goldhaber 326).

Schein explains that the purchase model's success relies on how accurately the client has: diagnosed their own need(s), communicated their need(s) to the consultant, assessed the consultant's capability to fulfill their need(s), thought through the outcomes of the consultant's intervention, and considered whether or not there is an external reality that can be utilized in the form of information or support to help fulfill organizational need(s) (Goldhaber 326). Therefore, this model is appropriate only when the client can effectively determine their needs, accurately assess the abilities of the consultant, successfully communicate their needs to the consultant, and can support the outcomes once the consultancy is over (Schein, 2009).

The following challenge meets the expectations of the purchase approach because Malcom Media has clearly articulated the situation (problem), defined a method for addressing the task (solution), and communicated their expectation for the consultant to implement their proposed method.

For more information about the role of the purchase consultant, see the "Theoretical underpinnings, the expert resource role (purchase-of-expertise model)" section in the "Proposal Submitted in response to RFP" (34).

c. Project background:

Malcolm Media is approaching its 50th anniversary this June (2014). As one in a small handful of media groups founded in California that continues to operate under original ownership, we would like to celebrate our industry experience and longevity with our customers. 50 years in business reflects the success and perseverance of our enterprise. We believe that the best way to promote our longevity in the media industry is to reinforce our traditional roots while proving our ability to innovate and excite contemporary consumers.

d. Scope of work:

Malcolm Media is seeking a communication consultant to raise awareness of the upcoming 50th anniversary milestone. Malcolm Media's ultimate objectives aimed at with this consultancy are as follows:

- To bolster the company image
- To boost employee morale
- To strengthen relationships with dealers, suppliers and customers
- To launch special promotions to increase sales

- To improve relations with the surrounding community

e. Specifications for deliverables – The consultant must:

- Develop and implement a public relations strategy that capitalizes on our anniversary year to bolster the company's image and boost employee moral
- Plan a glamorous 50th anniversary gala to honor and strengthen relationships with dealers, suppliers and customers (guest list will be provided).
- Organize a summer concert series as a platform for promoting the 50th anniversary and increasing sales
- Improve relations with the surrounding community by promoting Malcolm Media's charitable giving and support for the Los Angeles community

2. Malcolm Media needs a provider to assess the viability of new management at our San Francisco station. The consultant should also focus on identifying the source of recent spikes in employee turn-over rates to recommend a plan for addressing this issue.

a. Explanation to the reader, HR case:

The following case represents a HR-related organizational challenge. As previously noted, I chose to describe a HR challenge because of HR-related theories' pervasiveness in Cal Poly's Organizational Communication course curriculum and generally within the organizational communication discipline. In every textbook (Shockley-Zalabak; Miller; Modaff, DeWine, and Butler) used in Cal Poly's Organizational Communication course there is either an entire chapter, or a significant portion of chapter dedicated to human relations and human resources approaches. The purpose of these approaches follows, "Human relations theory and human resources theory were developed to promote the concerns of the individual worker in an atmosphere that was mainly focused on production" (Modaff, DeWine & Butler 43). Human relations theory is characterized by a heightened emphasis on communication, cooperation, participation, and celebration of the worker (Modaff, DeWine, and Butler 43).

Ultimately the limitations of human relations theory to improve the general state of affairs for workers in organizations inspired Miles (1965) to propose the *theory of human resources* as an alternative (Modaff, DeWine, and Butler 59). Miles proposed three main ways that human resources theory differed from human relations theory. First, human resources theory is based on the assumption that all people (not just managers) are "reservoirs of untapped resources" (Modaff, DeWine, and Butler 59). This assumes that it is up to the manager to "tap" these resources. Second, human resources theory asserts that many decisions can be made more effectively by workers that are directly involved with their consequences (Modaff, DeWine, and Butler 59). Lastly, human resources theory suggests that satisfaction is not necessarily a direct result of participation, but is instead a derivative of the improved decision making and self-control that results from effective, genuine participation (Modaff, DeWine & Butler 59).

Two of the most influential and lasting human resources theories to management are Rensis Likert's Four Systems of Management (1961) and Blake and Mouton's Managerial Grid (1964). Likert's theory proposed a continuum made up of four general systems of management ranging from a classically oriented system to a human resources system. Of the four (exploitative authoritative, benevolent authoritative, consultative, and participative), he argued that the participative system was the most effective (Modaff, DeWine, and Butler 62). This system emphasizes: genuine participation in decision making and goal setting, free-flowing communication, full use of every worker's skills and creative energy, and high level of responsibility and accountability for the goals of the organization (Modaff, DeWine, and Butler 62). Based on similar assumptions, Blake and Mouton's Managerial Grid proposes that management's main purpose is to promote a culture that allows for high productivity while also fostering employees' personal and professional development (Modaff, DeWine, and Butler 63).

More specifically, this organizational challenge is concerned with excessive employee turnover at one of the Malcolm Media offices. Modaff, DeWine, and Butler explicitly discuss turnover as a serious organizational challenge:

> Turnover, whether voluntary or involuntary, is a dramatic event. People's lives are often greatly changed, and the stress and difficulty of the situation affects the lives of their family and friends. This is true not only for the person leaving the organization, but for those with whom that person has worked; relationships have been formed (positive or otherwise), energy has been invested, and time has been spent. (140)

Modaff, DeWine, and Butler explain that in addition to the human factor, turnover also creates financial costs that impact the organization (140). They define the financial cost associated with turnover as follows, "*Turnover cost* refers to the amount of money that can be attributed to losing one employee and replacing that employee with another" (Modaff, DeWine, and Butler 140). In 2005, the Society for Human Resource Management (SHRM) reported that the cost of turnover involves several expenses which are summarized below:

- "Separation costs: exit interviewers' time and departing employee's time for the interview, separation pay, unemployment pay
- Replacement hiring costs: attracting new applicants, advertising, travel, recruiter salary or fee, entrance interviews, testing (physical, psychological, drug, health, etc.), hiring decision meetings
- Training new hire: information literature, general orientation training, job orientation training
- Lost productivity and business costs: overtime for remaining employees, temporary workers, performance differential, costs of low morale, lost customers/clients" (Modaff, DeWine, and Butler 140).

The following organizational challenge is most effectively approached from an HR perspective in order to integrate both a concern for Malcolm Media's production and employees.

b. Theoretical underpinnings, doctor-patient model:

In the doctor-patient model the level of interaction between the client and the consultant is relatively high (Schein, 1969). The client-consultant relationship is more involved than in the purchase model but less than in the process model. Schein (1969) describes that approach is called the doctor-patient model because the company complains about an “illness” and presents symptoms, but needs the expertise of a doctor to gather a deeper understanding to help diagnose the problem. In this sense, the role of the consultant is similar to that of a medical doctor, while the client is like the patient. Therefore, the consultant is responsible for diagnosing the “illness” and “prescribing” a solution.

Schein (2009) describes that when it comes to implementing the solution, it is either up to the consultant to implement the solution directly (e.g. medical doctor executing a surgery) or to prescribe a remedy to cure the client’s “illness” (e.g. prescribing medication). Just as with a doctor-patient relationship, the client may be able to sustain the solution on their own after the initial consultancy is over, or they may need to hire the consultant again. Schein (1988) believes that the likelihood that this model will be successful depends on whether or not: the client is motivated to reveal accurate information, the client accepts the consultant’s diagnosis and prescriptions, the consequences of the diagnostic processes are accurately understood and accepted, the client is able to implement the recommended changes, and whether or not the increased amount of client dependency serves to help or hinder the ultimate solution. Therefore, using the doctor-patient model is only appropriate when the client is experiencing symptoms, can identify the problem area, is willing to let the consultant intervene in the organization’s systems, and is willing to depend on the consultant for both the diagnosis and the implantation (Schein, 1988). A potential risk of using this model is if the consultant fails to collect accurate information or if the management is unwilling to accept the consultant's diagnosis or solution (Goldhaber 326).

The following challenge meets the expectations of the doctor-patient model because the Malcolm Media executives are aware that there is a problem (they are experiencing "symptoms"), but they are not really sure what is wrong or how to solve the issue. Therefore, the client is soliciting consulting services to "diagnose" the problem and prescribe a remedy to cure their "illness".

For more information about the role of the doctor-patient consultant, see the "Theoretical underpinnings, doctor role (doctor-patient model)" section in the "Proposal Submitted in Response to RFP" (41).

c. Project background:

Malcolm Media's San Francisco station, KTSF, was hit hard by the stagnant economy in recent years. The station experienced a substantial decline in overall revenue between the years 2010 and 2012 primarily due to a loss in many key commercial advertising accounts. The board of directors replaced previous management at this station with a new manager in January 2013. In January 2014 the board of directors reviewed the 2013 KTSF fiscal report. They were perplexed to see such significant indications of both positive and negative changes that had occurred at the station over the past year. On one hand, KTSF had successfully established many new advertising accounts and managed to increase overall profits by 300%. However on the other hand, the report showed a massive spike in the employee turnover rate which exceeded all previous reports from the station. The members of the board were delighted to see such a substantial increase in overall profits, yet were also very concerned about the recent spike in the station's employee turnover rate.

d. **Scope of work:**

The board of directors is requesting assistance from a communication consultant to evaluate the reasons for such deviations at KTSF over the 2013 fiscal year as indicated by the report. Based on their findings, the consultant should provide a recommendation for addressing this challenge.

3. **Malcom Media needs a provider to work with the Los Angeles-based management team to provide guidance for the development of effective and sustainable strategies aimed at optimizing collaboration among multinational virtual teams.**

a. **Explanation to the reader, globalization and virtual communication case:**

I set up this challenge to involve virtual teams because of this area's implications for organizational communication currently and in the future for our increasingly globalized society. Malcolm Media fits into Miller's definition of a multinational organization. Miller defines a multinational organization as one "that identifies with one nationality while doing business across several or many nations and whose management recognizes the needs of a multinational workforce, customer base, and institutional environment" (Miller 256). Virtual teams are defined as "teams in which team members are geographically dispersed (at least one-third of the team members work in different locations) but needed to collaborate with one another to get work done" (Derosa, "In Focus" 17).

Another factor that influenced my decision to include this organizational challenge was my personal experience working as a Program Manager intern at

Microsoft (summer 2013). This experience allowed me to more fully understand the dynamics and challenges of working in virtual teams in a global organization. The challenges I personally experienced and/or observed coincide with findings from Derosa's study of forty-eight virtual teams. The teams most frequently cited the following obstacles:

- Lack of face-to-face contact with team members.
- Lack of resources.
- Time-zone differences that hindered collaboration.
- People serving on too many different teams.
- Team members not sharing relevant information.
- Lack of training in the skills necessary for virtual teamwork (specifically, action planning, interpersonal communication, and collaboration).
- Dealing with poor performers.

b. Theoretical underpinnings, process model:

In the process model the level of interaction between the client and the consultant is the highest of all three approaches (Schein, 1969). The client and the consultant work jointly throughout the entire course of their interaction. Because this model functions like a partnership, both parties are responsible for establishing relationships, diagnosing issues, prescribing remedies, intervening, and terminating relationships. Schein defined process consultation as "A set of activities which help the client to perceive, understand, and act upon process events which occur in the client's environment" (Goldhaber 327). Therefore, the consultant's role is not to exclusively provide ideas and then implement them, but to collaborate with members of the organization, provide alternatives for them to make informed and responsible decisions, and to help establish internal commitment to these decisions. Inherent in this model is the assumption that the client desires to sustain the solution that develops out of their relationship with the consultant (Schein, 1988). This model is only appropriate when the client wants to learn and aims to take greater control and responsibility for understanding problems as well as designing and implementing solutions (Schein, 1988). This model is effective when the client is motivated to work on improvements on an ongoing basis and wants to develop greater capacity to do it within their own organization (Schein, 1988).

The following challenge meets the expectations of the process model because the managers do not know exactly how to address their needs or what options are available to them, but they are sincere in their desires for improvement. They also understand that they will be more effective if they learn the necessary skills needed to address their own challenges in the future.

For more information about the role of the process consultant, see "Theoretical underpinnings, process consultant role (process model)" in the "Proposal Submitted in Response to RFP" (46).

c. Project background:

Malcolm Media's recent expansion involving opening a new branch in London, U.K. has directed attention to the pressing need to develop effective and sustainable strategies aimed at optimizing collaboration among members of multinational virtual teams. Malcolm Media experienced a bit of pressure to optimize multinational communication back in 2008 with the opening of the Sydney, Australia office. However, because there are far fewer instances in which our Los Angeles-based employees are required to collaborate with our Sydney-based employees than with those now based in London, we have managed to do without the implementation of more strategic methods regarding multinational collaboration over the past few years.

d. Scope of work:

Malcolm Media is pursuing a consultant to work with the Los Angeles-based management team to provide guidance for enhancing employee success and satisfaction working in multinational teams. The consultant should be able to assist our management team with identifying and understanding the primary areas in which we should invest our resources for the development of the best and most sustainable strategies to enhance multinational team collaboration. We believe that we will be better suited to accomplish this goal with the support of a well-qualified communication specialist who is eager to collaborate with our Los Angeles-based management team.

IV. Response to RFP:

A consultant's response to the RFP shall include:

- A statement of the scope of services to be provided for each of the three challenges.
- Qualifications based on the consultant's skills and/or previous experiences to warrant selection of the provider for each of the three challenges

V. Evaluation criteria:

Selection of the Consultant will be based on the following criteria:

- “Responsiveness to the purpose and scope of the project;
- Adherence to the conditions, rules, regulations and requirements of the RFP;
- Experience and reputation of the Consultant” (“Sample RFP”)

VI. Budget/Cost projections:

Although most real-world RFPs will include this section, I have chosen to leave considerations about cost projections/budgeting out of the RFP and response to the RFP because these details are irrelevant to the overall aim of this senior project.

Proposal Submitted in Response to the RFP

I. Theoretical underpinnings, communicator credibility:

It is important that a consultant's body of knowledge and skill is appropriately matched to the client's needs for any given consulting project. Therefore, it is imperative for the client to be able to accurately assess the capabilities of the consultant based on information they provide in their response to a RFP. One way the consultant can better equip the client to make this assessment is by providing a section in their response in which they aim to establish credibility. A common method consultants use to establish credibility is describing previous organizational challenges they have worked on in which they successfully addressed the needs of a client with similar challenges.

McCroskey and Teven suggest that a communicator's image as perceived by the receiver(s) is central to persuasion and social influence. Aristotle referred to this image as the source's ethos, and believed that this was the communicator's most powerful means of persuasion (McCroskey and Teven 90). Contemporary persuasion scholars argue that *source credibility*, their term for the source's image, is a central aspect in the persuasiveness of any communicator (McCroskey and Teven 90). Three common dimensions of communicator credibility are typically discussed: expertise, trustworthiness, and goodwill (or intelligence, character, and goodwill, as originally proposed by Aristotle).

Expertise (sometimes referred to as "intelligence", "competence", "expertness", "authoritativeness", or "qualification") generally denotes whether the communicator is in a position to *know* the truth, or what is right or correct (O'Keefe 183). In his book *Networks of Capital and Influence: A Critical Social Inquiry into the Field of*

Management Consulting Tony Letrent-Jones defines expertise as “highly developed and specialized knowledge of and skills in such areas as a particular subject, field, industry, process, or technology for which one is generally known or recognized”. He goes on to discuss the ways in which expertise is leveraged as a form of “symbolic capital” in the field of consulting (293). In summary of his analysis Letrent-Jones proposes that “symbolic capital” is most commonly leveraged in the following areas:

> Both firms and individual consultants claim or are perceived to have expertise in either a combination of four domains: (a) functional area of practice such as strategy, marketing, mergers and acquisitions, logistics, or finance; (b) industry such as consumer products, telecommunications, entertainment, or utilities; (c) methodology, technology, process, product, or business model which would include such things as reengineering, value chain analysis, systems integration software products, or e-commerce; and (d) special skills such as research and analysis, selling, relationship management, persuasion, and negotiation. (294)

As the second dimension of communicator credibility, trustworthiness (sometimes called “character”, “safety”, or “personal integrity”) usually refers to whether the communicator will be likely to tell the *truth* as he or she believes it to be (O’Keefe 183). O’Keefe sees both expertise and trustworthiness as fundamental dimensions of credibility and suggests a symbiotic relationship between the two. O’Keefe states, “Perhaps it is not surprising that both expertise and trustworthiness emerge as basic dimensions of credibility because as a rule, only the conjunction of expertise and trustworthiness makes for a reliable communications” (183). O’Keefe acknowledges seven of the most commonly cited factors that can influence judgments of a communicator’s expertise and trustworthiness (i.e. credibility). These factors include: (a) information given about the communicator's education, occupation, and experience, (b) the prevalence of nonfluencies/variations in delivery, (c) the communicator's speaking rate, (d) the inclusion of evidence intended to support the persuader's claims, (e) the position that the communicator advocates, (f) the receiver's liking for the communicator, and (g) the inclusion of humor in persuasive messages. Yet, perhaps more attuned to the purposes of project are findings from Letrent-Jones' (2009) investigation, in which he discusses the most influential factors on perceptions of consultants' credibility. He concludes:

> Beyond educational credentials, according to the data, other forms of capital that bestow varying levels of legitimacy upon individual consultants within the field include the following: (a) "client-side" or "real world" experience, (b) certifications and memberships, (c) job title, (d) income, (e) areas of expertise, (f) client relationships, (g) name and reputation of one's firm, (h) books and articles written, (i) speeches made, (j) interviews given: publications quoted in; times quoted, (k) products developed and known for, and (1) success & "'war" stories accumulated and told" (291). The effects of credibility seem straight-forward, however, as O'Keefe recognizes, the magnitude and the direction of credibility effects can vary a great deal depending on the particulars of the situation. (196)

Goodwill (sometimes referred to as "intent towards receiver" or "perceived caring") is seen as the means for opening communication channels more widely (McCroskey and Teven 92). McCroskey and Teven explain that "goodwill" is often ignored by contemporary researches and some theorists even refer to it the "lost dimension" of ethos/credibility (McCroskey and Teven 90). Yet, in the world of consulting successful client-consultant relationships often rely on inordinately high levels of trust, honesty, and dependability. Goodwill plays an important role in a consultants' prospect of establishing adequate levels of credibility that enable then to engage in "open communication" with a client. The underlying assumption of this dimension is that we will be more willing to accept and listen more attentively to someone who is believed to have our best interests at heart than one who we see as deceitful or even simply indifferent to our wellbeing. McCroskey and Teven (1992) suggest that there are three methods which may be used to establish goodwill: understanding, empathy, and responsiveness (92). *Understanding* assumes that we feel closer to someone when we experience them acting in ways that demonstrate their sympathy to our concerns. *Empathy* goes a step farther, and can be established when the receiver is not only perceived as understanding of the communicator's concerns, but also as accepting of their views as valid. Lastly, *Responsiveness* involves the receiver acknowledging the speaker's communicative attempts. McCroskey and Teven note that all of these strategies can be used to enable the communicator to feel as though the receiver cares more about them (92).

Liking and similarity are two additional source factors that can contribute directly or indirectly to perceptions of communicator credibility. O'Keefe (2002) discusses many studies that have found support for the seemingly obvious proposition that liked communicators are more effective at influencing change than disliked communicators (196). However, this simple conclusion may be misleading. O'Keefe points out three exceptions to this general principle which occur in situations when communicator credibility, personal topic relevance to the receiver, and disliked communicators can rule over the persuasive effect of a liked communicator. Another source factor discussed by O'Keefe that has implications for a consultant's persuasiveness is *similarity*. Although it is natural to assume a causal relationship between perceived similarity and communicator effectiveness, O'Keefe concludes that this relationship is far more complex than this common assumption indicates. Rather, he states "similarities influence persuasive outcomes indirectly, especially by affecting the receivers liking for the communicator and the receiver's perception of the communicator's credibility" (O'Keefe 200).

In conclusion, the factors discussed above can have complex relationships with one another and can vary in direct and indirect effects on persuasive outcomes. This discussion has provided a backdrop for understanding how these factors can impact a consultant's persuasiveness. A general conclusion to be drawn is: in order to be successful, a consultant who adopts any of the three models (purchase, doctor-patient, or process) must at least be able to establish an adequate level perceived credibility in the eyes of the client. However, depending on the nature of the relationship, the level of interpersonal liking and perceived credibility required to make for a successful client-consultant relationship may vary. For example, as a result of the difference in the underlying assumptions, a process consultant will likely need to establish a higher level of credibility (and potentially liking) then a purchase consultant to be successful. This is because of the expectation for the process consultant to engage in a higher level of involvement with the client (among other reasons). Thus, a consultant's level of perceived credibility (which includes expertise, trustworthiness, and goodwill), along with other source factors such as similarity and liking, may vary depending on the situation, but will likely always play an important role with implications on the direction and outcomes of a consultancy.

II. Proposals in response to challenges described in RFP:

1. **Below I have provided a comprehensive outline detailing my plan to address the requested services regarding the implementation of a successful 50th anniversary campaign to promote Malcom Media:**

    a. **Explanation to the reader, response to PR case:**

    I developed the following proposal in light of common strategies that emerged out of my research on PR consultancies involving corporate anniversary campaigns. These considerations are illustrated in my recommendations for approaching this organizational challenge. For example, my decision to propose creating assets to help convey a common corporate story to employees and customers was directly inspired by Global Corporate Communications' PR strategy for the Bacardi Limited 150 year anniversary (Seymour 1). In my "experience" section of this response I drew inspiration from the "Dove Campaign for Real Beauty". I chose to reference this case because it has been a very successful PR campaign which was originally associated with the anniversary of the corporation.

    b. **Theoretical underpinnings, the expert resource role (purchase-of-expertise model):**

    In the expert resource role the consultant is expected to provide information and/or service (Schein 1969, 1988, 2009). The consultant assumes that the client is seeking their expertise of knowledge and/or service because they are not able to provide this for themselves. The essence of this role is that the consultant's power rests on a body of presumed knowledge and skill that can be applied to help fulfill the client's organizational need(s). The client defines a need and acknowledges that they have neither the time nor the resources to fulfill it (Schein, 1988). Thus, when the consultant adopts the role of the expert commissioned by the client to provide what they are good at, the client is in effect giving away power to the consultant and becoming dependent upon what the provider offers (Schein, 2009).

As mentioned in the theoretical explanation of the purchase model in the RFP (see pg. 4 of RFP), according to Schein, the likelihood that this role will be helpful depends on various factors. Schein (2009) points to this requirement of fulfilling all of these factors as the primary reason for frequent client dissatisfaction with outcome of a purchase consultancy. Schein states:

> Helpers who adopt this role from the beginning are less successful in situations where the problem is more complex. The frequent dissatisfaction with organizational or management consultants and the low rate of implementation of their recommendations can easily be explained when one considers how many of the associated assumptions would be met for the information/service giver role to work effectively in complex organizational situations. (56)

For this reason the purchase role is most effectively applied when the consultant is sought to solve a relatively straight-forward organizational challenge that they are well-qualified to address.

c. Recommendations/scope of services:

- To develop and implement a comprehensive PR strategy that capitalizes on the anniversary year I will:
    - Craft a clear, corporate story that highlights the anniversary:
        - I will create assets such as timelines, videos, imagery, screensavers, infographics and more to help tell the story. These will be used for the entire year on corporate material to boost employee morale and bolster the company image.
    - Facilitate internal awareness of the anniversary campaign to ensure cross-platform promotion: I will contact and send marketing plans/materials to Malcolm Media branch managers, marketing directors, creative directors, web-designers, and individuals' in-charge of social media to assist in promoting the anniversary campaign via a variety of consumer channels.
- To organize a glamorous 50^{th} anniversary gala, I plan to:
    - Design the gala around a common anniversary theme
    - Create custom invitations to be sent to individuals on the guest list
    - Reserve a trendy, up-scale venue in Los Angeles for the event
    - Organize a series of live performances depicting the organization through its 50 years
    - Design a radio promotion designed to endorse the trendy gala and raffle off a small number of tickets to listeners
- To organize a summer concert series, I plan to:

  - Coordinate an exciting and successful summer concert series in LA:
    - Book 6-8 popular musicians/bands
    - Reserve a large outdoor venue for the concert series
    - Design concert tickets that feature Malcolm Media's 50th anniversary logo
    - Reserve food and beverage venders to serve at the concerts
  - Promote the concert series:
    - I will organize a radio promotion for Malcolm Media stations involving 50 days of concert ticket giveaways for listeners (in light of the 50th anniversary)
    - I will design marketing materials for the concert series
    - I will contact all CA-based Malcolm Media branches and send them marketing materials to assist with promoting the 50th anniversary concert series via radio stations, websites, social media, etc.
- Promote Malcolm Media's charitable giving and community involvement:
  - Sponsor local charity events
  - Promote the company's charitable giving and seek community involvement through events and radio commentary
  - Organize an auction at the 50th anniversary gala that donates all profits to local charities

d. Experience:

The following example serves to demonstrate a previous case in which I solved a similar challenge for another organization:

- Client challenge: Successfully promote the "100 years of beauty" campaign
    - A well-known cosmetics and personal care company needed to capitalize on 100 years in business. To do this, they wanted to ensure that they were able to effectively promote their "100 years of beauty" campaign.
    - They wanted to create a high-impact campaign that served both to promote their brand and to foster a positive body image among girls. I was directed to:
        - Produce advertising materials that promoted the "100 years of beauty" campaign.
        - Streamline all media channels to promote the campaign.
        - Work with a variety of non-profit organizations dedicated to helping girls with a negative body image.
        - Reach out to celebrities in favor of the cause to assist in promoting the "100 years of beauty" campaign.
        - Organize a charity event to promote the "100 years of beauty campaign"
- My response: Delivered a multi-faceted PR campaign
    - I developed a multi-faceted PR campaign which emphasized the 100th anniversary of the company and also focused on promoting positive self-esteem among girls.

        - Redesigned the organization’s website to reflect the campaign.
        - Developed a slogan and logo to represent the campaign.
        - Produced multiple TV commercials and magazine ads promoting the “100 years of beauty” campaign that conveyed a positive message about body image.
    - Delivered a successful charity event
        - Organized a fashion show at the charity event which featured a variety of “real women” (not typical stick-skinny models).
        - Held an auction at the charity event. Proceeds from the auction went to non-profit organizations who aim to help young girls with poor self-esteem.
- Results: Substantially increased sales and raised a large sum of money for non- profit organizations
    - Latest Nielson data showed sales of the company’s products in supermarkets went up by 9.7% in value and 9.9% in volume over the course of the campaign. Skin-care products showed the largest growth (14% value and volume uplift) which is where new users usually enter the market.
    - The charity event earned roughly $685,000 in profits which all went to non-profit organizations helping girls to develop a positive body-image.

2. **Below I have described my plan to assess the viability of new management at the KTSF station and provide an accurate diagnosis and solution for recent spikes in the employee turn-over rate at this office.**

   a. **Explanation to the reader, response to HR case:**

      My recommendation for this organizational challenge advocates personally being present to observe at KTSF. This falls in line with the majority of the literature on HR consultancies which provide support for field-based observation (Vosburgh, 2010). My proposed data collection methods (direct observation of daily life at the office, employee interviews, and employee focus groups) are also representative of common and generally successful HR consultancy approaches (Vosburgh, 2010).

      The areas I list as potential factors for my analysis (i.e. organizational culture, managerial style, dynamics of organizational teams, dynamics of superior/subornment relationships, organizational conflict, and communication climate, etc.) are representative of HR-related topics covered in organizational communication textbooks (Modaff, DeWine and Butler; Shockley-Zalabak; Miller). Depending on the “consultant’s” findings from this analysis they could look to organizational communication theories like: realistic recruitment, organizational culture, Maslow’s hierarchy of needs, Black and Mouton’s Managerial Grid, Likert’s system IV, conflict management styles, superior-subordinate communication, peer and coworker communication, organizational teams, leadership, and more to help guide the remainder of their consultancy (Modaff, DeWine and Butler, 2008).

b. Theoretical underpinnings, doctor role (doctor-patient model):

In the doctor role the consultant diagnoses the organizational issue and prescribes a solution. Schein (2009) notes, “In this relationship, the report, the presentation of findings, the diagnosis, and the recommendations take on special importance in identifying what the helper does” (73). As Schein (2009) recognizes, this role can be seen as an extension of the expert-resource role because it places even more power into the hands of the consultant and creates an even higher level of dependency (72). Likewise Goldhaber (1993) explains “The main difference between the purchase model and the doctor-patient model is that in the former, diagnosis is done by the client, in the latter, it is done by the consultant” (326).

Therefore, in the doctor role the consultant is seen as an expert who not only provides information and services but also diagnoses and defines the problem and administers the cure (Schein, 2009). Schein (2009) explains, “The helper/consultant is brought in to find out what is wrong with which part of the organization and then, like a physician, is expected to recommend a program of therapy or prescribe a remedial measure” (72). The organization and its internal managers are viewed as being incapable of knowing their own issues and/or of developing solutions for them. Spindler and Steger (2011) note that “This implies the need to repair people or organizations” (4). As mentioned in the theoretical explanation of the doctor-patient model in the RFP (see pg. 7 of RFP), according to Schein, the likelihood that this role will be helpful depends on various factors. Schein recognizes that the ultimate challenge with the doctor-patient model is sensing when enough trust has been built up between the client and consultant for the consultant to take on this powerful role. A key assumption exists during the onset of the consultancy relationship that both the client and the consultant are ignorant of many things that should eventually impact the diagnosis and prescription. To be effective, the relationship must be focused on removing some of this ignorance. Schein (2009) recognizes that this model is fraught with difficulties in spite of its popularity (73).

c. Recommendations/scope of services:

I recommend personally being present at the San Francisco office to observe the KTSF station to collect data that will allow me to fully understand the dynamics of the work environment. In similar projects I have worked on in the past I have found that field-based research is the most valid for human resource development. In this case, field-based research will enable me to conduct a thorough analysis to inform my diagnosis of recent spikes in employee turnover and evaluate the effectiveness of new management. Upon acquiring an adequate level of understanding of these issues, I will consolidate my findings into a report and present my findings, diagnosis, and my recommendations to the Malcolm Media board of directors.

During my time at the KTSF station I will aim to collect data to establish a general organizational profile. My data collection methods will include: direct observation of daily life at the office, employee interviews, and employee focus groups. Due to the sudden emergence of these organizational challenges, as indicated by Malcolm Media's 2013 fiscal report, I will be looking for evidence of changes over time in variables such as the following:

- Level of job satisfaction among employees
- Socialization and training programs for new employees
- Organizational culture
- Managerial style
- Dynamics of organizational teams
- Dynamics of superior/subordinate relationships
- Organizational conflict
- Communication climate

Consequently, my investigation of these variables may also include looking back at reports from the past two-three years to help me understand the reason for the sudden emergence of these challenges. Establishing a timeline of alterations in these variables will better equip me to diagnose and treat these organizational challenges.

d. Experience:

The following example serves to demonstrate a previous case in which I solved a similar challenge for another organization:

- Client challenge: Excessive employee turnover
    - A large software engineering company was concerned about excessively high and rising employee turnover rates at their main headquarters.

    - They needed to identify the reasons for such excessive employee turnover and take measures to diminish the issue.
- My response: Approaching employee turnover as a multifaceted performance issue
    - Through an extensive performance analysis which approached employee turnover as a multifaceted performance issue, I was able to effectively identify several sources of turnover.
    - The analysis involved thorough interviews and observation.
    - In light of findings from this analysis, I designed several specific interventions to improve the organization's turnover primarily among intro-level software engineers. These were implemented over a six month period.
- Results: Employee turnover returned to a healthy rate
    - Since my intervention in 2010, the company's employee turnover rate has steadily decreased. The turnover rate has been cut in half since the end of my consultancy.
    - Follow-up interviews with employees indicate that the interventions aimed at diminishing excessive employee turnover were successful and resulted in positive changes in the overall work environment.

3. **Below I have provided my plan to provide guidance to Malcolm Media's Los Angeles-based management team for the development of effective and sustainable strategies aimed at optimizing collaboration among multinational virtual teams.**

a. Explanation to the reader, response to globalization and virtual communication case:

Because of the complexity and subjectivity of this organizational challenge (hence its application of the process model) my response was influenced by contingency theory. “Contingency theory posits that there is no best way to structure and manage organizations. Instead, structure and management are contingent on the nature of the environment in which the organization is situated” (Modaff, DeWine, and Butler 81). Some researchers believe that contingency theory can be applied to address organizational decisions made about the most appropriate communication medium for use in a given situation. Modaff, DeWine, and Butler state that “the degree of equivocality, or uncertainty, in a situation; the need for quick feedback; and the personalness of the source may be better predictions of the type of mediated communication used” (292). With this basis in mind, the consultant’s approach to this challenge should also reflect an understanding similar to that proposed by Miller in her discussion of globalization. She concludes that communication in global organizations must depend largely on balancing the forces of *convergence* (which emphasizes the need of organizations to adapt their practices to a globalized professional world) and *divergence* (which emphasizes appreciation of cultural distinctiveness around the world) (262).

The “experience” section offered in my response was inspired mostly by two case studies from OnPoint Consulting Llc. OnPoint Consulting is a consulting agency that specialized in virtual communication and globalization organizational challenges.

b. Theoretical underpinnings, process consultant role (process model):

In the process consulting role the provider focuses on the communication process from the very beginning (Schein, 2009 77). Schein (1988) differentiates PC from the other consulting approaches by emphasizing that it “is a kind of philosophy about and attitude toward the process of helping individuals, groups, and organizations, as opposed to a mere set of techniques” (1). Without ignoring the content of the client’s request, Schein (1988) suggests that the consultancy should primarily focus on the initial interaction in order to establish a climate and relationship that will permit both the client and the consultant to remove their ignorance.

The consultant should resist falling into a position of power, (i.e. expert-resource or doctor role) and instead adopt a position of humble inquiry (Schein, 1988). Schein (2009) states, “The concept is not to assume too much, but rather to create a situation where not only will the client reveal more, but in that process will begin to gain status and develop trust” (77). The consultant must serve as a helper in ways that fall in line with the fundamental underlying assumption of the process model that “only the clients know the true complexity of their situation, and only they know what will work for them in the culture in which they live” (Spindler and Steger 4). As Schein (2009) recognizes “Frequently clients may be able to help themselves, and it is often more appropriate to facilitate this form of helping than to tell them what to do or fix things for them” (62).

It is easy to see how one needs to be in this role when a client brings up a complex personal or organizational problem (Schein, 2009 78). Schein (2009) discusses that adoption of the process consultant role rests on the following assumptions:

- Clients often are not fully aware of what's wrong within their organization and need help diagnosing their organizational challenges. Yet, only the client owns and lives with their challenges. Clients often are not aware of the types of assistance that consultants can provide them. They need guidance to understand what kinds of help seek.
- Most clients have a constructive desire to improve, but need help in identifying what and how to improve.
- Only the clients fully understand what adjustments will work within their own environments.
- If clients learn to identify their own organizational problems and think through solutions for themselves, they will be likely to implement the solution and better equipped to solve like challenges in the future should they recur.
- The ultimate function of the process consultant is to pass on diagnostic skills and intervene constructively so that clients become increasingly more proficient at solving organizational challenges on their own.

Schein (2009) offers a central proposition of helping, "Any helping situation must begin with the helper adopting the process consulting role in order to do the following: (a) remove the ignorance inherent in the situation, (b) lessen the initial status differential, and (c) identify what further role may be most suitable to the problem intended" (72). Schein (1988) explains that while PC is a very open ended activity that usually is not formalized in terms of contracts, timetables, or project definitions, it nonetheless contains steps and stages that characterize the PC relationship (117). These include: (a) initial contact with the client organization; (b) defining the relationship, psychological contract; (c) selecting and setting a method of work; (d) diagnostic interventions and data gathering; (e) confrontive interventions; and (f) reducing involvement and termination.

According to Schein initial contact begins when (1988) "The contact client indicates that he perceives a problem that he feels is not being solved by normal organizational procedures, or he sees a lack that cannot be filled by present organizational resources" (119). After the client has contacted a consultant to help with this issue comes what Schein calls "The Exploratory Meeting". Both Schein (1969, 1988, 2009) and Goldhaber (1993) insist that this initial meeting between the client and the consultant is a crucial component of the PC approach. Schein (1988) explains that the purpose of this meeting is for the two parties to establish, in detail, the nature of the problem, the nature of commitment to the consultant, the nature of the consultant's commitment to the organization, and next action steps, assuming that the answers to the second and third topics are positive (Schein 123). Both Schein and Goldhaber find it imperative for the consultant to insist that this initial meeting consists of individuals who are close to the top of the power structure of the organization, along with any other members who will eventually help to define the problem or work with the consultant. Argyris also shares this point of view. He asserts "If the interventionist is to have the best possible opportunity to help the client system generate valid information, make free and informed decisions, and develop internal commitment, he should strive to begin at the highest level in the organization necessary to accomplish these tasks" (Goldhaber 331). Similarly Letrent-Jones who conducted a meta-analysis of real-world trends and phenomenon in the consulting industry concludes that "the relationship starts and stops at the senior executive level as that is the level at which a consult has most likely been hired or, at least, the level at which project approval has been granted." Schein (1988) notes that any initial contact with the client is intended to define the relationship and establish a clear psychological contract to guide the remainder of the consultancy (130). The central purpose of this stage is for the consultant to clear up as many misconceptions as possible and to articulate their style of work and personal aims. Schein emphasizes that the psychological contract should be primarily informal in nature in order to allow any party to terminate or alter the level of involvement at any time (130).

Schein (1988) notes that it is important that the setting and the method of work be jointly decided upon by the client and the consultant (140). This step is centered on making decisions to define the immediate client system to which the consultant will relate to. The decisions made in this step including: the setting in which to work, the specification of a time schedule, a description of the method of work to be used, and a preliminary statement about goals to be achieved, are crucial for setting a foundation upon which interventions can occur (Schein, 1988 131).

The next step, diagnostic interventions and data gathering, consists of the consultant choosing a data-gathering method and constructively intervening by gathering data that pertains to the aims of the PC project. The method that the consultant chooses should be in line with the underlying values of PC and with the general goals of the project. Schein (1988) lists three basic diagnostic data-gathering methods: observation, interview, and questionnaire (147).

Schein (1988) calls the subsequent step “confrontive interventions” which he defines as “specific attempts to change organizational process by deliberate actions on the part of the consultant” (148). He describes four different categories of confrontive interventions: agenda management, use feedback, coaching/counseling, and structural suggestions. The basic purpose of agenda management is to make the group aware of their internal processes and to encourage the group to take interest in analyzing these processes (149). Feedback is a form of intervention in which sessions are held to provide constructive feedback based either on observed data or on data obtained in interviews (Schein, 1988 165). Coaching/counseling often naturally results from the feedback stage and occurs either in specific sessions devoted to this that purpose or as part of an ongoing interaction in a group (Schein, 1988 176). Lastly, structural suggestions aim to intervene by offering suggestions pertaining to process-oriented meetings or other parts of the consultation project (Schein, 1988 176). A standard formula for how a consultant can apply these forms of intervention doesn’t exist. Rather, knowledge of these simply informs the process consultant of the available means for intervening in a variety of ways as opportunities arise or as his or her judgments indicate when certain actions are appropriate.

For the final step, reducing involvement and termination, Schein (1988) advises that: (a) reducing involvement should be a mutually agreed upon decision between the client and the consultant, (b) reducing involvement shouldn't generally drop to zero to allow for continuation at a very low level, and (c) the door should always be left open for further involvement with the client in the future (185).

c. Recommendations/scope of services:

Based on my understanding of this challenge, I recommend that we begin by setting an initial meeting to clearly define the problem space. In this meeting I would like us to discuss Malcolm Media's current and prospective ventures, the company's various branches, and any other information that will be advantageous for us to establish about the organization before moving forward with this consultancy. At this kick-off meeting, I recommend that all members who will be involved in this consultancy at any stage, especially those who will influence ultimate decisions made about solutions and implementation, be present at the meeting. The primary objectives at this meeting will be for us to collaboratively work towards establishing trust and deciding upon precise outcomes that we mutually wish to accomplish through this consultancy.

After we have established a solid foundation based on mutual understanding, I will work with the management team to guide and collaborate with them in conducting a thorough analysis of the available options for virtual communication among multinational Malcom Media teams. To do this we will first employ three basic diagnostic data-gathering methods. We will work collaboratively to make observations, conduct interviews, and administer questionnaires to employees. To ensure that I am not perceived as a stranger to the employees, before the data gathering stage begins I would like one of the senior executives to join me in introducing myself to the body of employees we will be collecting data from. The organization will be responsible for identifying the body of employees that we will focus our data collection efforts on. Depending on our findings from the data, we will mutually decide either to use all, or a combination of the following types of interventions: agenda management, use feedback, coaching/counseling, and structural suggestions.

As sustainability of solutions developed during this consultancy is an important goal, I will serve primarily to collaboratively work with the management team, provide guidance, and propose options in order to enable the managers to make more informed decisions about solutions that are ultimately implemented. Due to the complexity of the challenge at hand, I believe this approach will allow Malcolm Media to come to the best solutions fit for the corporation's unique set of needs. In addition, this approach will equip Malcolm Media managers with the knowledge and skills necessary to address similar challenges should they recur in the future. Once the Malcolm Media management team feels confident that they can proceed effectively with a lesser degree of involvement from me as the consultant, we will mutually agree upon when to slowly begin reducing my level of involvement.

d. Experience

The following section serves to demonstrate a previous case in which I solved a similar challenge for another organization:

- Client challenge: Improve global teamwork
    - Due to globalization, a large multinational pharmaceuticals company needed improve global teamwork and ensure that employees and team leaders had the knowledge and skills to work effectively in virtual settings. The emergence of many new multi-national projects and virtual teams created novel challenges for the organization.
    - The increased need for coordination, communication, and documentation required the existence of effective leadership and team collaboration from a distance. The company wanted to work closely with a communication specialist to explore a variety of strategies that would be both effective and sustainable over a long period of time.
- My response: Guided the client in the development of a custom training program
    - I presented a variety of factors that the company should take into account in order to designate cohesive teams and successful leaders for virtual groups. This information was used by upper-level management to help them make informed decisions while organizing the company's virtual teams and choosing team leaders.
    - A handful of the top-level managers and I jointly interviewed a number of individuals who already, or would soon be assigned to work

as a member or leader on a virtual team. The purpose was to understand their unique challenges, priorities, and the skills and knowledge needed for success.

    - Based on the interviews we developed custom two-day training program for the employees and for the team leaders who would be working on virtual teams in the future.
    - I taught a handful of the managers the skills needed to conduct the training program and to interpret data on the effectiveness of their virtual teams in the future. We jointly administered the training program to the first group of individuals who would be assigned new virtual teams.

- Results: Increased confidence and productivity among individuals working on virtual teams
    - Participant evaluations of the training programs have been overwhelmingly positive with an average rating of 9.2 on a scale of 10. The majority of participants reported that they feel more confident and productive working in virtual teams after completing the course.
    - The company found the “virtual team training program” to be so effective that they recently decided to incorporate it into their corporate training curriculum.

Project Conclusion

I expect that this project has helped to (a) illuminate the real-world processes and methodologies of organizational consulting as a field of professional practice in our increasingly business-oriented society; (b) facilitate a deeper understanding of the field itself in terms of its philosophical and attitudinal assumptions that underlie it, its culture, and how interpersonal and institutional relationships within the field are structured; as well as (c) produce a heightened understanding of the ways in which an undergraduate education in communication studies serves to prepare individuals for working in the professional field of organizational consulting.

With this project I have delivered two fully developed and carefully constructed formal correspondence documents (i.e. the RFP and the Response to the REF) to represent a realistic client-consultant project bidding process. For clarity and to warrant this project's connections to the communication studies discipline, I also offered accompanying theoretical elucidations that explained (a) the philosophical and attitudinal assumptions underlying each of Schein's (1969, 1988, 2009) three behavioral models of organizational consultation (purchase-of-expertise, doctor-patient, and process) and (b) pertinent organizational communication and persuasion concepts. These insights, in addition to those gained through my review of the literature from within the organizational consulting field, helped to guide my construction of the professional correspondences presented in this project.

I feel that this project has served to prepare me for ultimately working as an organizational consultant by bestowing me with a thorough understanding of this professional field. As a result, this project has enhanced my interest and confidence in pursuing a career in organizational consulting. In conclusion, this project (with both theoretical and applied portions) has not only served as personal preparation for one day working as a professional consultant, but has also contributed to the existing body of literature concerning organizational communication, development, and consultation.

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