**When to use an External Consultant or Facilitator and/or a Coach**

An external consultants and/or facilitator is especially helpful when you need:

1. their **expertise and skill** set to allow everyone to participate and do their best work;
2. to **fully participate** yourself and can’t facilitate; and/or
3. **someone external** to your organization to help lend neutrality and validity to the process.

Roles for a **facilitator or consultant**[[1]](#footnote-1):

* A “**collaborator**” - works as a partner with the organization, contributing process knowledge and is involved with the client in decision-making. The client is supported in building expertise to accomplish tasks once the approach is determined. **The consultant** does not take on the role of the manager, rather he or she partners with the manager and/or leader and group members. The facilitator/consultant *provides guidance to the process, collaborates in data collection, facilitate planning meetings and retreats, and works with the organization to solve problems so they stay solved.*
* A **“pair of hands**” - to do tasks you could potentially do yourself but may not have the staff, time or availability to accomplish (*organize meetings and agendas, keep time, keep on track, scribe, etc*) Having someone else take on these duties allows all members to participate fully and with fewer distractions
* An “**expert**” - provides knowledge or skills that the organization does not have in-house (*regarding a process, model, or structure that the client needs.)* Decisions on how to proceed are made by the consultant, using expert judgment, to solve an immediate problem. Managers are less involved, and have the role to evaluate after the fact.

1. This consulting approach is similar to Edgar Schein’s description in Chapter 2 of his book *Process Consulting: Volume II* in which he described three models of consulting-client relationships as follows:

   * **Expertise**. In this model the clients has decided on the issue to be addressed, what kind of help is needed and to whom to go for help. Examples of this relationship include: a client hires a computer programmer to write a program or hires an architect to design a building.
   * **Doctor-patient.** In this situation the consultant has the additional power to make a diagnosis and to recommend what kind of expertise and information are needed to address the issue. The traditional doctor-patient relationship illustrates this model.
   * **Process consultation.** The difference between this model and the other two is not so much in what the client asks the consultant to do, but in how the consultant structures the relationship with the client. In this relationship the client works with the consultant to diagnose, generate solutions and implement those solutions.

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