

Working with Consultants

Heather Ramsey, Director, Strategic Partnerships, Center for Women's Leadership Initiatives, Institute of International Education (IIE)

Beth Kanter, Social Media Strategies and Author

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1. What resulted from the consulting project that was transformative?

Heather: Beth from the beginning led the content and curriculum development for the program, training for 220 NGO in Middle East and Africa, to better advocate their causes, increase their support base. Beth was the leader, reality initially she wasn't supposed to drive the curriculum but she did due to issues with another consultant. Beth stepped in and created a five-module curriculum, to be 15 days and training over 18 months by a team of in country trainers. The project resulted in training 225 people from 60 countries.

The curriculum was better than anything we could've gotten. She recognized the great need for the help, even though it wasn't what we had agreed to. The curriculum was well received. She has a following and fan club now! That was special. Having a celebrity curriculum developer for our partners brings a level of credibility to the work and training. Beth was great in getting to know what they needed to learn, tailored the curriculum based on a needs assessment. Then she went with us to train the trainers in Beirut. When things were not going well, Beth stepped in, at least helped changed the tone of what was happening. At the closing conferences in Jordan and Morocco, she inspired the organizations there and building field relationships with them. The key to working with Beth is that she's not a faraway person, but she really connects with people, supports their work and builds friendships. The project was transformative in so many ways. For organizational effectiveness in using social media, building real relationships and partnerships, person-to-person was key to all of our projects; Beth really listens to them, knows they are the experts in their countries, and not dictate what they should know or do.

Beth: I had not done an intense training like this ... developing relationship over 18 months. I like to have relationships grow over time, and support them over time. The project was transformative for me as well... I had the chance to build my skills, and developed more confidence in my skills to create a curriculum. I was able to jump in and solve a problem in real time (other partner on the team was facilitating but the group turned on her). I had not had that situation before, and followed my intuition and smoothed it down. For me, that was a transformative experience. This experience got me more interested in those facilitation and training techniques, like facilitating in 2 – 3 languages, in a cross-cultural setting and customizing it for the audience. I have experience going cross-sectors – environment, young people... and able to do it with confidence. What excited me about the project was that it provided me the chance to deliver service, and personally a chance to learn and grow. I don't take on work that I don't feel like I can learn and grow.

2. How was IIE "ready" for this project?

Heather: We had worked with our partners on the ground. So often the way we have to develop program is to respond to RFPs with very limited time to do research... when we submit a proposal, we hope organizations are ready to work with us. Until implementation, we find out what's really needed and we adjust. It was clear that IIE wanted to work with Women in Technology Mena, to train on the basic application of MS, citizen journalism at the time, blogging; we knew there was a hunger for this. Sixty organizations expressed the need for more. This project aimed more at building organizational capacity than training individual skills. We heard the need from them and they wanted to learn more. Here we are in SF/Silicon Valley, with a wealth of resources here and corporations to do things internationally, give back, we see it as a marriage of those things - need and resources. Feedback from previous projects we knew there was a hunger for technology. Arab Spring happened months after our project launch. It was a timely project, and oddly, hosting social media training at the tail end of Arab Spring. There was a lot of interest in the region, but the expertise at using it was not at the organizational level. The grassroots leaders had no web presence at the time and without social media training.

Beth: A lot of work I do have to do with organizational culture and capacity. Everyone said "we're ready, we want to do this." We didn't have the battle of resistance.

3. What are two or three things that made your partnership tick?

Heather: Many things and our personal relationships, Beth and I do really different work. We have similar values – help orgs, support change for the greater cause to build a more safe, peaceful, better world. Even though I barely use social media when we met, and she's an obvious expert, and we didn't connect there, but we really connected on a values level. That helped build trust. Beth had to give me feedback working with my team, and I try to listen, and take her feedback into consideration. I think she knew I really value her opinions and I trust Beth so much. She always delivers. With other groups, you have to worry about deadlines, are they going to do what she said... she would deliver something great even if it's not what we might have planned.

Beth: One thing I noticed about Heather, with many different moving parts and people, she's really good at participatory design. We had some frameworks about design. She's really good at listening, letting go of control, not being a micro-manager, but here when negotiating between the parties with good listening. I trust her completely... when she asks can you do X, I know she's thought about it. I knew her from a colleague I trust... and they told me "here's a really good match for you."

4. Looking back, knowing what you know now, what's one thing you would have done differently?

Beth: We had such fantastic partners, but one wasn't so great. In the beginning, I was new to working with Heather and I wasn't sure... if Heather had her on the team she was probably great. A month or two went by, I wasn't sure if I should have said something. With a lot of partners, you have to get a better understanding of the relationships... I should have said something earlier without damaging the relationships. I was thinking, "I want to give it a chance." Having a way to have an early warning system on that without coming off as badmouthing is a lesson I learned.

Heather: There were two people not up to the standards and expectations. I tend to trust everyone more than not... back then, I definitely trusted that they were going to deliver, but should have nipped it in the bud earlier. There were some communications breakdown. Beth didn't know it was her place to say something. It was a new partner. Would have liked some way to anticipate when things go poorly and take care of it earlier, rather than hoping that it would get better. Not sure if it could have been avoided.

Beth: There was also different cultures involved with a group that's based in-country. They promised more than they could deliver and were using, "I know this world, I know this culture..." and I bought into that, as opposed to seeing through it and it's an excuse for not delivering. We ran the risk of potentially being accused of not understanding the culture. When you're working in a cross-cultural context with a set of complicated partnerships, it's hard to make the call so cleanly.

5. Assuming Heather has worked with consultants before, what made this partnership with Beth different? More joyous? More impact? And, for Beth, you've worked with lots of social sector leaders, what made Heather stand out?

Heather: Beth has so much knowledge to offer... somehow she manages to continue to hone her own skills, keep up with cutting-edge technology, and transfer that out through her blogs and training. It's extraordinary to watch her in action. She adapts to the situations. Other consultants I've worked with when they can't operate in an ideal environment, they get lost, stumble, stressed. Beth might be stressed when things aren't set up the way she had asked... she finds a way to not have that impact the people in the room. She handles it so well... people can't tell. Unexpected things happen all the time, like in Jordan with internet access; Beth was adaptable, humble, fun to have around. We consider her a superstar, there with participants and us, and she's one of us, she wants to learn from participants. I've been so flattered about the nice things she's said about me. I can't believe I get to do this work. She's a joy to be around, and that makes such a huge difference when you travel together. Beth is meticulous in thinking things through, and really passionate; all that shine through. I love how humble she is. You don't find that in leaders, who are in demand in what she does. She's not intimidating to participants and team members.

Beth: The first thing is Heather really cares about the work and the people. We're both get excited about "it's our calling!" passionate about empowering women in different parts of the world. That shines through. You want to do your best work to support that.

Heather is intuitive, feeling, really good at reading people, really good 1:1, and listening. She doesn't impose her own ideas on things. When she asks for something, not specifically part of the scope or work, I know she's asking for that because it's a part of the work... to get to the results. Other people ask for things and it's just for them.

I also appreciate IIE's openness to experiment with things, like being more transparent, especially on a State Department project where there's generally a higher level of paranoia. There's a sense of calmness and negotiations.

6. How did you find each other?

Heather found Beth through a colleague.

Tips

Heather:

1. Have a very specific scope of work, deliverables, dates, make sure the parties understand the scope and what's to be delivered. Every time I have had a trouble, I have to go back to the scope and making sure it's specific. It's really hard, when you're launching a project, to be specific about the scope and legal documents. When you have problems, use the scope.
2. Work with consultants that have a real purpose for working with people. Make a good decision, be very careful about your choices. Make sure you're in it for the same reason.

Beth:

1. Start up with phone calls and several meetings to talk about the workplan.
2. In the beginning, talk about what you're supposed to be doing. Things are coming up, keep on scope.
3. There's always the issue of scope creep... want to support the client, but need to keep within the parameters of what you've been hired to do. That's important. If you allow scope creep you're working for free.
4. Have a regular talk about the workplan. Make this be part of the project.