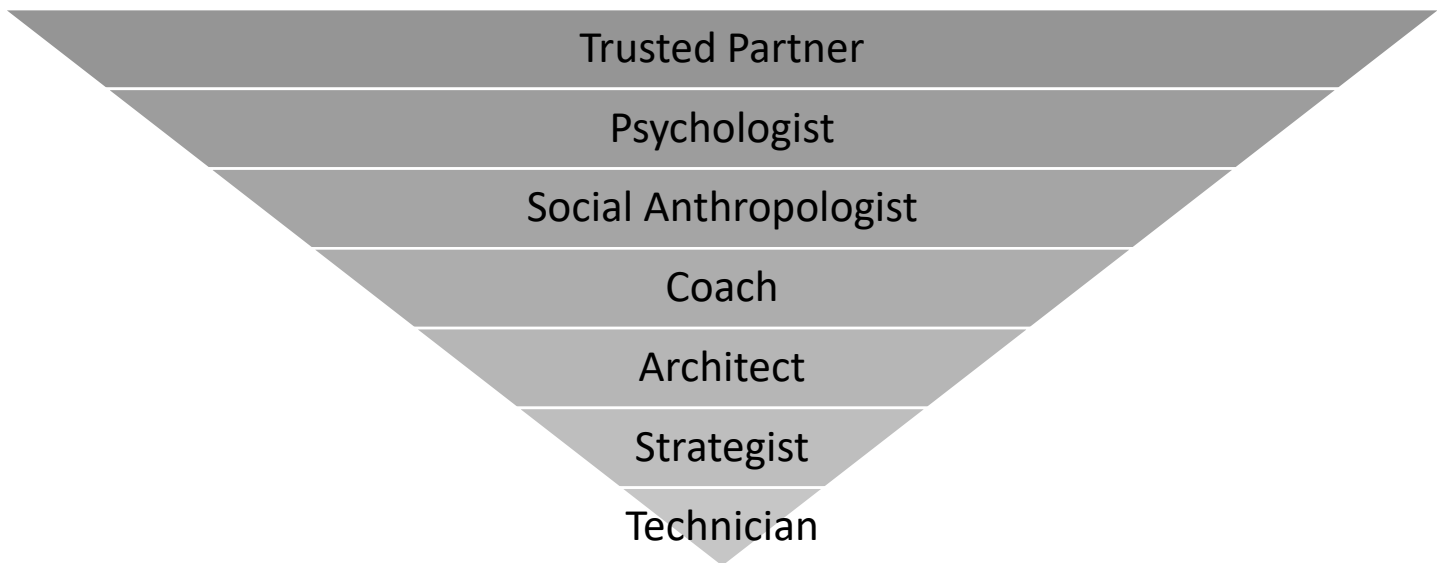


The Seven Roles of an Excellent Consultant® - Rob Levit



Levels	Key Activities	Possible Concerns
Level 1 – Technician	✓ Set-up, diagnose and fix.	<ul style="list-style-type: none"> ➤ Lack of technical knowledge and ability ➤ Inaccurate diagnosis ➤ Botch job – the fix is worse than the problem ➤ Inadequate organizational knowledge/context
Level 2 – Strategist	✓ Create plans, activities, next steps and timelines.	<ul style="list-style-type: none"> ➤ Looks great on paper! No translation to reality. ➤ Created by the consultant, not the team/organization ➤ No or low organizational will/ability to execute ➤ Doesn't account for human factors/resistance ➤ Strategy often assumes a perfect world
Level 3 – Architect	✓ Build sustainable and strategically-aligned structures and systems.	<ul style="list-style-type: none"> ➤ Falling in love with structures and systems that may be irrelevant by the time they are constructed ➤ Too much complexity for the client/org to deal with ➤ Too simple to be effective (oversimplifies strategy)
Level 4 – Coach	✓ Use inquiry, check-ins, relationship-building and emotional intelligence to monitor progress and accountability.	<ul style="list-style-type: none"> ➤ Relationship boundaries unclear/inappropriate ➤ Client says one thing and does another ➤ Emotions of client and consultant cause interference and possible transference
Level 5 – Social Anthropologist	✓ Deep observation and insight generated over time through patience, mindfulness and compassion.	<ul style="list-style-type: none"> ➤ Consultant knows more about the organization than leadership ➤ Consultant is viewed as an intruder/interloper in organizational culture ➤ Organization hides “real” issues on consultant visits
Level 6 – Psychologist	✓ Identifying, understanding and generating change from the deep roots of individual and organizational behavior.	<ul style="list-style-type: none"> ➤ The situation is a much bigger mess than initially realized ➤ Consultant is in too deep – “wish had known earlier” ➤ Consultant begins to lose objectivity and becomes less effective based on unchecked/unconscious bias
Level 7 – Trusted Partner	✓ Deep collaboration skills and resilience to manage change, crises and chaos. Sustaining positive relationships based-on Levels 1-6.	<ul style="list-style-type: none"> ➤ Consultant is blamed for failure(s) ➤ Consultant loses objectivity and forgets purpose/role ➤ Consultant is viewed as an everyday employee/loses “outsider” status ➤ Consultant overstays-over-contributes/scope creep