

INTERNAL CONSULTING

Nancy Drew as *Organizational Consultant*

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THE INFLUENCE GURU

Both detectives and consultants listen more than they speak. Here is what to ask — and what the answers you don't get are telling you.

I have always thought that the role of the organizational consultant is analogous to that of a detective. I'm sure my early love for fictional detectives like Nancy Drew and Sherlock Holmes put me on the path to becoming first an internal and then an external consultant. Both detectives and consultants need to listen more than they speak. They need to observe and gather as much information as possible before coming to a conclusion.

As an internal consultant, you often have a great deal of background information about individuals, teams, and business units that can help make sense of events that might otherwise seem strange and mysterious. Taking on the role of "organizational detective" means adopting an attitude of curiosity and skepticism; seeking evidence rather than acting on others' suspicions or assumptions.

The process of initiating a client engagement — the Contact Phase¹ — is similar to beginning the investigation of a mystery. Early in this phase, you find out as much as you can about the current situation. You ask what your client is hoping to achieve through the intervention he or she is asking you to conduct.

In the Agreement Phase, negotiate with your client as to what roles each of you will take and what resources will be required. Before deciding on the nature of the intervention, you want to gain a great deal of background information.

You really wear your detective hat in the Information and Assessment Phase. Use the receptive skills of Inquiring and Listening in order to learn important information. You'll want to stay objective and search for clues within the information you gather. Ask yourself, "What does it mean? What does it point to in the way of an intervention?"

Below are some useful questions and some clues that you should pay attention to, and may cause you to rethink your involvement or the timing of your involvement. If you receive information that suggests a problem, use listening behaviors to confirm that you have understood correctly — and also to help the client rethink certain issues. To gather information, begin with some of the suggested open-ended questions or statements below. Draw out the client to learn more. If the client seems hesitant, take a step back, and do what you need to do to establish greater trust and rapport.

Questions about goals

- What would success look like? What's your vision?
- What results do you want to see? What outcomes are you looking for? What do you hope to achieve?

CLUES

If the client cannot tell you clearly what he or she hopes to achieve, even after you draw him or her out, that could be a clue that:

- This person is not the true client for the intervention.
- The client is in a “don't just stand there, do something!” mode and has not thought about this very much.
- There is a major “hidden agenda” for this intervention.
- There are internal disagreements that need to be resolved before you proceed.

Questions about background

- What has led up to this event, meeting, or change? What have you done in the past to deal with this issue, problem, or need?
- What has been your role in the past regarding this issue? What are your current responsibilities regarding it?
- Who has decision authority regarding this intervention?
- Who are the stakeholders in the outcomes of this intervention?
- Who else needs to be involved in the planning? Who should I be talking to?

CLUES

If the client cannot give you good information on the background, authority, and stakeholders regarding this issue, it could be a clue that:

- Key information is being withheld for political reasons.
- There is a major “hidden agenda” for this intervention.
- The person you are talking to is not the client; you will need to talk with someone who has greater authority and more knowledge.

Questions about the organization

- Help me to understand the mission of your organization.
- What are the current strengths of this organization? What are the needs?
- What are your strategic goals and objectives?
- What are the “hot issues” right now?

CLUES

If the client cannot provide you with this information, you have a clue that:

- He or she may be a “go-between” and not the real client.
- The “hot issues” are so politically charged they are not to be talked about to anyone outside of the organization. You will probably need to gain the client’s trust about this before you can go much farther.
- The organization may not be clear about its mission, goals, and objectives.
- The organization or the client has had an external focus and has not done much analysis of itself; you may want this to be a part of your intervention.

Questions about the participants or stakeholders

- What is the background of the participants in the meeting, event, or intervention?
- What is the nature of their relationship with one another — both the practical nature and the quality? Have they worked together before, and if so, for how long and how well?
- How much background do they have in this area? What is their skill and experience level? Have they done anything like this before?
- What expressed needs of theirs will this meet? How much do they know about this event or intervention? What are their expectations? What concerns have they expressed?
- Who has a stake in the outcome of the intervention? Who else should I be talking to?

CLUES

If your client cannot answer these questions, it's a clue that:

- The participants have not been selected yet and doing so will become part of the intervention. This can be an advantage.
- The participants have been selected but there is a perceived political problem related to participating; either it is “privileged” and others will be upset that they were not selected, or it is seen as “remedial” and something others should not know about.
- The participants and stakeholders have not been told about this intervention and the client doesn't want to let them know until the last minute because of anticipated resistance.
- The relationships among the participants and stakeholders are difficult and the client hopes that a miracle will be performed by having you work with them without being aware of this.

The detective's attitude

Becoming a great internal organizational detective requires you to maintain an attitude that is:

- Curious
- Objective
- Observant
- Skeptical, but not cynical

Being a skilled and conscious detective while practicing your internal consulting work creates value for your clients – and supports a fascinating career for you.

¹ See *Consulting on the Inside: A Practical Guide for Internal Consultants* by Beverly Scott and B. Kim Barnes (ASTD Press, 2011).

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Founder of **The Influence Guru**, Kim Barnes is a coach, facilitator, and author with more than forty years of experience in leadership, influence, and organization development. She was a founder and, for many years, CEO of Barnes & Conti Associates, and developed or co-developed programs including *Exercising Influence*, *Inspirational Leadership*, *Intelligent Risk-Taking*, *Consulting on the Inside*, and *Managing Innovation*. She is the author of six books, including *Exercising Influence* (Wiley) and *Building Better Ideas* (Berrett-Koehler). She works with enterprise companies, government agencies, small businesses, and individuals from the San Francisco Bay Area.

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