



# FLAWLESS CONSULTING®

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Workshop Overview

# INTRODUCTION

Whether you have been hired to “get things done” or find yourself cast as the expert who has all of the answers, Flawless Consulting® will help you redefine your role as a collaborative partner. This methodology is about showing up with courage, clarity, and care to build relationships that allow your expertise to thrive, rather than being controlled. The shift from order-taker to trusted ally is at the heart of every meaningful and sustainable collaboration.



Our Flawless Consulting Workshop, based on Peter Block’s bestselling book *Flawless Consulting: A Guide to Getting Your Expertise Used*, equips consultants —whether they consider themselves consultants or not —with the mindset and tools to build strong partnerships, navigate resistance, and lead change with integrity.

Through interactive sessions, participants learn how to bring honesty, compassion, and clarity into every consulting interaction—from *contracting* to *discovery* to *implementation*. Grounded in principles of authenticity and collaboration, this workshop transforms how people work together to solve complex organizational challenges.

“Flawless Consulting is an instrumental component of our organization’s “SOS” (Sales Operating System). Whether you are delivering consulting work or just simply engaging in a conversation, Flawless Consulting has a framework that has served us well in producing engaging and productive conversations with our colleagues, clients, and business partners.”

— JULIAN E. LOPEZ  
CHARLES SCHWAB & CO., INC.

**40+**

**Years of  
experience**

**10+**

**Countries**

**3k+**

**Client  
Accounts**

**15+**

**Industries**

**1m+**

**Professionals  
Impacted**

# THE PHASES OF FLAWLESS CONSULTING



## Contracting

### Contracting

**Goal:** Reach a clear agreement

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## Discovery

### Discovery

**Goal:** Get the clear picture and understand any underlying issues or problems

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## Feedback / Decision to Act

### Feedback / Decision to Act

**Goal:** Help the client to make a decision to act

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## Implementation

### Implementation

**Goal:** Build commitment

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## Evaluation / Termination

### Evaluation / Termination

**Goal:** End the engagement or cycle back to contracting

# BE FLAWLESS®

## What you'll learn

- **Contracting Clearly:** Establish mutual expectations and roles from the start
- **Navigating Resistance:** Recognize and honor resistance rather than avoiding it
- **Building Trust:** Create authentic partnerships rooted in care and accountability
- **Collecting Data and Feedback:** Gather and share information in a way that builds ownership and uncovers underlying issues or concerns
- **Presenting Feedback and Proposals:** Deliver insights without blame or pretense
- **Advocating for Change:** Influence through partnership, not control

## Who should join

- Leaders seeking to foster collaboration and accountability
- External consultants and coaches
- Internal consultants, HR professionals, OD practitioners, IT departments, and more
- Anyone responsible for building capacity and facilitating change

## Key Benefits

- Learn a repeatable, scalable, human-centered consulting process
- Accelerate the process of building collaborative relationships
- Practice real-life conversations in small groups using tested frameworks
- Receive feedback and coaching in a supportive environment
- Leave with tools, checklists, and strategies you can apply immediately
- Become part of a larger learning community that has over 40 years' worth of practitioners

## Workshop Details

- Live Online or In-House options
- Highly interactive with role-playing scenarios, case studies, and reflection
- Led by certified Flawless Consulting facilitators
- Earn a Flawless Consulting Certificate of Completion
- Train-the-Trainer and Master Certification available

# Course Overview

## **Flawless Consulting 1: Building Strategic Partnerships**

### **Start Where You Are**

- Conduct a Consultant Role Inventory self-assessment that will help you understand how you are currently operating in a relationship with clients

### **Master the Art of Contracting**

- Embrace clarity and assertiveness through case studies, role-plays, and small-group skills practice
- Become comfortable stating your wants through skills practice and role-playing in small groups
- Learn to manage resistance by first identifying it and then use a simple technique to surface it for dialogue and action
- Practice holding a contracting meeting and apply it to a real-life scenario

### **Get a Taste of Discovery and Feedback**

- Become familiar with the goals and phases of Flawless Consulting, and learn how to apply them to a real-life scenario throughout the workshop

## **Flawless Consulting 2: Getting Your Expertise Used**

### **Start Where You Left Off**

- Reconvene and rediscover the foundation of Flawless Consulting by reviewing core concepts and share lessons through your real-life application of the model


### **Form Consulting Teams**

- Break into consulting teams to take a case through Contracting, Discovery, and Feedback
- Practice your contracting skills by working with a team to conduct a live contracting meeting with client to set the stage for Discovery and Feedback

### **Uncover the Problem in the Discovery Phase**

- Conduct Discovery Interviews with the client and key stakeholders to understand the underlying dimensions of the client's problem
- Partner with team members to organize the data to identify key issues and themes
- Determine what feedback you want to provide your client and identify potential solutions to solve the underlying issue or problem

### **Give Flawless Feedback and Offer Recommendations**

- Learn a formula for providing feedback to help motivate a client to act on underlying issues
  - Conduct a Feedback Meeting with client to present what was learned in the Discover Phase and partner on potential solutions to the underlying problem
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# SUSTAIN THE LEARNING

The learning doesn't stop when you finish Flawless. Here are some ideas for how you can continue practicing and perfecting skills post-workshop:



## **Contract with Yourself**

Reflect on what skills you'll apply, your challenges and commitments, and what support you need and from whom.



## **Meet with a Manager**

Share learnings and get support using the "Contract with Boss" framework.



## **Peer-Learning Circles**

Form "buddy teams" with colleagues to support ongoing practice.



## **Practice with a Client**

Use your new skills in a safe, low-stakes consulting interaction.

## **Core Competencies**

Authentic Communication  
Building Trust  
Reaching Agreement  
Critical Thinking  
Decision-Making  
Delivering Feedback  
Facilitating Collaboration  
Maintaining Accountability  
Needs Assessment  
Navigating Resistance  
Problem-Solving  
Promoting Systemic Change

## **Additional Solutions**

- Individual Coaching, Group Coaching, and Consulting
- Keynote Presentations and Facilitated Gatherings
- Leader as Convener Workshop
- Empowered at Work Workshop
- Powerful Conversations for Chaotic Times: 90-Minute Intensives



# TOOLS & RESOURCES


## Media Kit for a Successful Rollout

- Welcome Video from Peter Block
- Sample Invitations
- Course Overviews
- Sample Talking Points
- Promotional Graphics

## Checklists and Worksheets

- Assessing the balance of responsibility
- Analyzing one of your contracts
- Planning a contracting meeting
- Reviewing the contracting meeting
- Planning a discovery meeting
- Reviewing the discovery meeting
- Planning a meeting for action
- Reviewing the meeting for action
- Preparing for implementation
- Reviewing an implementation event

## Flawless Consulting Expanded Book Content

- Bonner Case Study
  - More differences between the technical/business problem and how the problem is being managed
  - Layers of Analysis Exercise
  - An Exercise on Renegotiating
  - Expectations about Participation Exercise
  - Rearranging the Room
  - Creating a Platform for Openness and Doubt
  - What Do We Want to Create Together?
  - Creating a New Conversation
  - Choosing Accountability and Commitment
  - Closing with Focus on Gifts
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# SAMPLE RESOURCE

## Checklist for Planning a Contracting Meeting

1. What are you feeling about being in this meeting?  
What personal acknowledgment will you make?
2. What do you know about the situation?  
How might you get the client to give you their version of the presenting problem?
3. What might the client want?
4. What do you want? (Which wants are essential? Desirable?)  
Use the "Identifying Consultant Wants" section of this page.
5. What might the client be concerned about?  
What forms of resistance can you anticipate?
6. How might you be able to name the resistance?
7. How might you be able to support the concerns?
8. What questions can you ask to test for additional client concerns before ending the meeting?

Some of this may seem like speculation before the meeting takes place, but it is helpful to become aware of possible difficulties before they arise.

## Identifying Consultant Wants

Leverage in the Contracting Meeting comes from knowing what you want.

1. What do you think the problem is?  
What limits do you want to set on your involvement?
2. What kinds of information do you need? Include both hard data (figures, work flows) and soft data (attitudes toward the problem, clarity on roles and responsibilities, etc.)
3. How do you see your role?
4. What product do you plan on delivering? (i.e., what form will it take, how specific will your recommendations be?)
5. What support and involvement do you want from the client?
6. What time schedule do you want?
7. What kind of feedback do you want from your client? (during and after the project?)
8. How do want to handle confidentiality?
9. How do you want to measure success?
10. Who else should be party to this contract?

These questions are also useful to have for reference during the contracting meeting to help insure that no important issues remain unresolved.

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# WHY CHOOSE DESIGNED LEARNING?

**Build trust, partnership, and authenticity into your organization's everyday conversations.**

For over 45 years, Designed Learning has believed that consulting isn't just a job description, it's a way of working that allows individuals to lead with clarity, accountability, and compassion. Our Flawless Consulting workshops have helped organizations worldwide shift the way they communicate, collaborate, and create lasting change.

## What Makes Us Different

- **Based on Peter Block's proven methodology:** We are the home of Peter Block's Flawless Consulting, a methodology that continues to resonate decades after its original publication.
- **Rooted in partnership, not power:** Our approach is built on the idea that influence without authority is at the heart of most modern work. Our workshops equip people to be effective partners, not passive order-takers or domineering experts, whether they are in HR, IT, Finance, Healthcare, or Community organizations.
- **Hands-on and Real Time:** In our workshops, participants don't just learn concepts. They practice them. Through small-group practice, coaching, feedback, and role-playing, individuals walk away with new habits and mindsets that will change the way they work forever.
- **Human Centered and Process-Practiced:** Relationships are the mechanism for getting anything done within organizations. Flawless Consulting provides a human-centered process for accelerating the building of these relationships with intention.
- **A Tailored Approach:** All participants are invited to schedule a 30-minute one-on-one coaching session with their facilitator to discuss strategies for applying the *Flawless Consulting* model to their unique experience.


**Organizations that invest in Flawless Consulting have seen measurable shifts in:**

- Authentic employee engagement
- Interdepartmental collaboration
- Ownership and accountability
- Leadership at all levels

## Who we work with

From Fortune 500 companies to public sector teams and nonprofit leaders, Designed Learning has helped thousands of professionals worldwide become more trusted, effective, and human consultants —no matter their title. View our client list [here](#).

Whether you are leading change, advising others, or just tired of transactional work culture, our workshops offer a powerful, sustainable, and practical path forward.



# CONTACT US



## Website

[designedlearning.com](https://designedlearning.com)

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## Phone

+1 (248) 701-5928

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## E-mail

[info@designedlearning.com](mailto:info@designedlearning.com)

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## LinkedIn

[linkedin.com/company/designed-learning](https://linkedin.com/company/designed-learning)

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