

How To Be A Business Coach

William S. Royce

Management consultants commonly fantasize like Walter Mitty about being closeted in the office of the chief executive of a large corporation, revealing a strategic vision for the firm and how it should be attained. It is also common to characterize this role as that of a "coach" - involving some image of "calling the plays" without actually taking over the company. Most often, the allusion fails to recognize the various roles that coaches play in different sports, in the arts, and in other endeavors.

Notwithstanding the fact that very few consultants ever have this fantasy fully come true, we are often involved in coaching

The consultant-coach does not have to be an all-star player. His job is to teach the client and see that his best ideas are carried out. Some of the best coaches are McGoozlers.

roles as part of our regular work. So it is useful to consider what "coaching" really means and how it differs from other roles in management consulting.

There have been a few cases in which consultant-coaches really did take over the company, that is, were hired in as chief executive. (Westinghouse and Transamerica were two corporations in the 1960s that made such moves.) In these cases, the "coach" became the "captain" of the team. And as in most sports, the ques-

tion remains whether the move constituted a step up or down. Certainly, the roles changed.

[In this article, efforts have been made to use "gender-free" language. The author believes that consultants or managers of either sex can play any of the roles described. Male-sounding pronouns are used only when necessary to avoid "she/he" or other clumsy locutions.]

What Is a Business Coach?

The dictionaries offer several definitions of a "coach" that are worth considering in relation to consulting. These include:

- a private tutor,
- one who instructs and trains a performer or a team,
- one who instructs players in fundamentals of a competition,
- one who directs team strategy.

Each of these definitions implies different characteristics and responsibilities as applied to different consulting roles. There are also several different types or levels of coaching, each of which calls for different qualifications.

The *Head Coach* is usually a generalist, who must be familiar with all aspects of the game and also must manage the subordinate coaches. The Head Coach of a professional football team may have a dozen assistants. The consultant Head Coach, therefore, must be not only a good consul-

tant but also a good team manager.

The *Specialist* coach covers a specific, limited area of the game. In football, it may be coaching quarterbacks or defensive linemen. A singing coach may work only with sopranos. In business, the specialties may be in generating strategies, engineering, marketing, financial analysis, or human resources development. Some hybrids are able to cover two or more specialties. Of course, the Specialist may have ambitions to become a Head Coach some day. Meanwhile, the Specialist must be content to follow the lead of the Head Coach, even while tactfully instructing the Head Coach in the latest niceties of the specialty.

Team Coaching, comprising a Head Coach and several Specialists, requires the ability of the various coaches to work in harmony for the benefit of the client, despite frequent differences in temperament, training, and style. Most large consulting firms offer team coaching on major assignments, but some do it better than others. The team leader may be a martinet, using subordinates only as puppets (data diggers, analyzers, chart drawers, etc.) and use their products to make solo presentations to the client. Other leaders divide the work and the credit among team members, giving each an opportunity to work directly with their client counterparts.

The *One-Man Band* approach to coaching is also common, in athletics, in the arts, and in business.

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This may be a generalist, who tries to cover the whole field without assistants, whether or not fully qualified to do so. Or it may be a specialist, called in to handle a particular problem - the tennis coach who specializes in baseline play, a voice coach in singing or speaking, or a computer network wizard. The consultant should remember which type of coaching role is called for in a particular situation and not stretch the limits of capability.

WHICH TYPE OF COACH ARE YOU?

Reliable Retainer	Rasputin
Problem Solver	Occult Seer
Idea Generator	Take-Charge Guy
Cheerleader	Leech
Hero to the Rescue	Kelly Person
Second-Opinion Diagnostician	McGoozler

Read the story to find out!

Depending on the game, the coach may or may not have responsibility for performance or the outcome. A professional golfer goes to an experienced coach for tips on putting but still must win tournaments on his own. On the other hand, remember the cliché in football:

If the team wins, it is because it has good players;

if it loses, they had a lousy coach!

It may be similar in business. If things go well, executives may claim all the credit and ignore the contribution of the consultant-coaches. If the outcome is bad, those in the company may complain that the consultant gave poor advice. The consultant may claim to have provided good coaching that was not followed properly. Who said life is fair?

The question remains: Who gets judged - the teacher or the pupil? In the field of education, there are those who suggest that the student's grade is the measure of whether the teacher did a good job. Obviously, it is not as simple as that in education, sports, or business. But it is important for the consultant to understand the extent of the coach's responsibility for ultimate performance and how it will be measured.

What Type of Consultant Coach Are You?

Beyond the simple variations suggested by sports, one can recognize a whole typology of consultant-coaches, based on what services they perform and their style of operation. Some consultants can switch roles with comparative ease; others are good mainly at one type and may get in trouble when they stray outside their specialty. There are overlaps among the various types, which include:

Reliable Retainer: The main role of this type of coach is to help management avoid trouble, preferably without making any more waves than necessary. Knows the

company history, why things are done as they are, helps ensure stability. Examples are the traditional accountant, legal advisor, or statistician.

Cheerleader (often titled "confidential advisor"): A possible variation of the Reliable Retainer who may perform similar duties but with the primary mission of assuring management that everything is okay. In danger of becoming a "yes-man" or sycophant, saying only what the client wants to hear.

Problem Solver: Called in to analyze and cure a specific problem, to upgrade a system, or develop a new approach when existing methods no longer suffice. May be an analyst-researcher, litigation specialist, engineer, financial management innovator, or marketing sleuth. May handle one-of-a-kind problems or repetitive situations. Often brought in to assist internal staff but could meet resistance from inside, since their employment suggests that the regulars could not do the job.

Forecaster: There are various types. The methodical viewer of the future understands data sources and forecasting methodology, constructs alternative scenarios, clarifies assumptions, and explains the implications of each scenario for the client - in a scrupulously objective manner, without recommending what should be done about it. The occult seer or visionary may deal more with signs and hunches, the flash of prophecy or innovative but unsupported recommendation that can make or break a company. A sub-species, the *Devil's Advocate*, maybe the harbinger of threats and opportunities who pushes management out of its rut and into new ventures.

Idea Generator: From the general to the specific, this may be the creator of broad strategies, the researcher-inventor, or the product developer. Also may be the innovator in marketing, advertising, internal human relations, manufacturing management, or distribution. The ideas may come fully developed by the individual coach. More likely, they will require inputs from other consultants and company people before they are ready for implementation.

Take-Charge Guy: There are several variations on this. The *hero to the rescue* may be engaged to save management from its own mistakes or may become the interim replacement until a new chief executive is found. The *professional man s-o-b from out of town* is brought in to do the hatchet-job management disdains to perform. Or the *turnaround specialist* is expected to show management how to lead the firm back to glory. Other than in turnarounds, these are not truly coaching assignments, since they diminish rather than enhance the roles of the regular players. In any of these roles, the Take-Charge Guy usually starts with a problem, since the mission implies that the incumbent management is somewhat lacking in competency.

Rasputin: The insidious variation of the Take-Charge Guy, who insinuates himself with a key executive to exercise power from behind the scenes, more in the ultimate interests of the mentor than of the client.

Kelly Person. This is an augmentation to existing staff. May be replacement for people on vacation or sick leave; may be part-time support in an overload situation; or may be a tryout for a

full-time position. (Full credit to the Kelly organization that popularized the term.)

Second-Opinion Diagnostician: The CEO needs affirmation of a pending decision. Or the CEO may distrust an internal recommendation and wishes an independent evaluation. The consultant's role may be a truly objective one. Or it may be merely to take the heat off the insiders and spread the responsibility.

Leech: The consultant who tries to become indispensable to the client, preferably by being very good as a coach, perhaps by unduly prolonging the assignment, perhaps by creating such a mess that only the consultant could unscramble it, or always finding a new problem that no one else can solve.

Finally, there is a type of coach I have long admired:

McGoozler: The first master of this art was lobbyist-consultant Howard McGowan, who represented several Pacific Northwest industries in Washington, D.C., in the late 1940s. As he described it, the "McGoozle" is the fine art of putting the other person in the position where he has to do what you want him to do - but making him think it was his own idea. The McGoozler not only must create the scenario but coach other participants in their roles.

For example, a political situation could be so maneuvered that a Senator would be "inspired" to initiate some legislation that would help his constituency, even though its main benefit would be to some other area. Within a corporation, a counterpart might be to maneuver a marketing executive into supporting a risky research effort (obviously wanted mostly by the R&D people) be-

cause it would enhance the corporate image in the marketplace.

The opportunity to pull off a classic McGoozle is rare - but immensely satisfying. One example enabled assembly of the site for Seattle's "Century 21" World Fair of 1962. Of several sites under consideration, the most desirable covered several run-down blocks near the waterfront just northwest of downtown. But it also included a National Guard armory, a Catholic Church, a Synagogue, a Masonic Temple, and a stadium owned by the High School District - none of which wanted to relinquish control over its property and each politically powerful enough to prevent any thought of condemnation. As coach-consultant to the Washington State World Fair Commission, I suggested we co-opt each of these key groups into the plan for the fair, by incorporating their facilities into the fair as focal points for religious, cultural, athletic, or other events; making investments in upgrading their buildings; and guaranteeing their return to the original owners in better condition than before. The proposal converted potential opponents into enthusiastic supporters of what became the first financially successful World Fair.

Obviously, each case raises ethical as well as practical questions for the consultant-coach. Some of these include:

- Do I understand the role my client really wants me to play?
- Can I play that role, successfully and in good conscience?
- How far can I go in disagreeing with my client and still be useful?
- What is my relationship with others in the company?

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- What if my work makes others look bad, jeopardizes someone's job?
- What is my own real objective; am I just doing an assignment or am I trying to get hired by the company?
- How can I maximize my contribution and still help others contribute?
- Which, if any, of the insider information I pick up may I use in other ways, for my benefit or for other clients?

In consulting work, there are several approaches a coach can take. Each may be appropriate under varying circumstances, for example:

This is OUR Way! The implication of this approach is that there is only one "correct" way to do something, namely that espoused by the coach. In the case of an accounting system that must operate in accordance with law and standard practices, this may be true. For most other management functions it can be troublesome, just as it is difficult for one athletic coach to apply a single approach to teams with different player capabilities. Sometimes the approach must be tailored to fit the material. There are some variations to consider.

One version takes the theme: "Tell us about our business, so we can tell you how to run it." It involves much asking of questions and analysis of internal data about the client firm but, perhaps, too little listening to any ideas the client people may have. Then the coaches recite back what they have learned, along with their recommendations about how things should be changed.

Another is: "Here's our template, just reorganize to con-

form." This runs on the assumptions that a finite set of templates can be applied to any corporate situation, that the coaching team already knows all the usable combinations, and that they can fit the proper combination to this client's needs.

Here's what I can do for you. This is the pure generalist approach, often used when neither the client nor the consultant initially knows for sure what the problem is or how it should be solved. In such cases, the coach simply begins by saying: "These are my qualifications; how do they fit your needs?"

Here's what you NEED. This is a more aggressive approach, in which the coach says: "I already know the answer; let's start doing it." It resumes the consultant has enough prior knowledge of both the industry and the particular situation to make such a confident statement and that the CEO agrees. The emphasis is on implementation, not analysis.

This is how I understand your problem. There are two versions to this approach, each of which assumes at least some preliminary study by the consultant, whose understanding, by the way, may be somewhat different from the understanding of the problem as viewed by those inside the company.

One variation (which I much prefer) is: "If you agree with my diagnosis, we can find the solution together." This leads to a joint-team approach, under which those inside the company work with the consultants to develop an acceptable solution.

The other variation is: "If you agree, I'll be back in six weeks with the answer." This implies that the consultant will go off and

work out a solution separately. The only coaching involved may be in teaching the client team how to implement the solution. The consultant may seem a hero for now but will not have really helped the client team over the longer pull.

Remember the Chinese proverb: "If you give a man a fish, he can eat or today; teach him how to fish, he can eat for life." The latter is the consultant-coach's noblest role.

Just leave everything to ME. This approach seeks maximum flexibility for the "expert" and involves a minimum of coaching. Again, there are two variations:

The first variation is: "I'll see you in two weeks with the solution." Then the consultant goes away, does whatever is needed to develop the magic answer, and returns to amaze the client.

The other variant is: "We'll muck around the company a while and see what we can come up with." Actually, this can be a productive approach when the problem is ill-defined, the consultants are perceptive, and the client is patient. The hazard is that the consultants must appear to know what they are doing, even while wandering around asking multitudinous questions of people who resent their intrusions. The smart CEO would not allow this to go on for more than two weeks before demanding a progress report and a firm plan (and budget) for further action. Very little coaching is involved.

What do YOU think you need? This is another good exploratory approach. Get the client executives to talk about their business problem and try to describe what would be a satisfactory solution. Then you can work up a method

of arriving at that happy state. Again, two variations:

The first is: "If we agree, I can help you. Your desired 'state of satisfaction' sounds reasonable and attainable, and I think I can help you get there. This is how we would go about it."

The alternative is: "If that is what you want, I'm not the one to help you. Perhaps I can suggest someone more appropriate."

What do you WANT me to do? This is similar to the previous approach but may have ethical problems, capability requirements, or other considerations that cause you to hesitate seeking the assignment.

- Maybe I can do it; maybe I can't. Let's talk some more.
- Maybe we need other help.
- Maybe what you want, you shouldn't have. I cannot, in good conscience, help you do it.

Let's take a phased approach., one step at a time. This is the ideal approach to any complex but ill-defined problem. Suggest to the client that neither you nor they should commit to a major project before you both understand what you are getting into. If the client likes the results of the first phase, you'll talk about the next.

There are some clear advantages to this approach. First, it's a good opportunity for you and a new client to become acquainted and to establish a coaching relationship in which you can both be comfortable. Second, you can go into a modest first phase with less danger of bringing on a major disaster. Third, even this exploratory phase should promise some useful results - an early return on the investment - which may be only a mutual realization that you

can't solve the problem no matter how much time and money you spend on it. Fourth, you have an opportunity to identify and bound the real problem for pay, instead of as a promotional effort.

A great temptation for all consultants is to use the first phase as a "loss leader" - to underprice it deliberately in the hope it will lead to more lucrative follow-on work. Experienced consultants know this is usually a mistake. If the first phase turns out badly, you automatically lose on that. If it goes well, you have trouble convincing the client to accept your higher charges for later work. Or you may have spent your time educating the client who then goes elsewhere for the better-paid follow-on.

You Must Know as Much as Are You?

The qualifications for a good business coach often vary from those required of an expert consultant. Remember, the main responsibility of a coach is to teach or train the client in better ways of doing things, not just to provide solutions to problems.

There's an old rule in consulting: "To teach a do new tricks, you must know at least as much as the dog." The rule has often been violated in recent years by consulting firms that send inexperienced people to tell others how to run their businesses.

While many successful coaches in sports and other fields were not outstandingly successful as performers, they were avid students of their chosen game, learned the fine points by watching the best,

and are able to synthesize the principles of success and then communicate this knowledge to their proteges. (Walter Alston in baseball is one example. The good teaching pro in golf, seldom a big money winner, is sought out by even the best tournament players for tips when their game goes sour.) These excellent coaches defy the old put-down: "Those who can, do; those who can't, teach."

The Peter Principle also applies. Many coaches who do well in the minor leagues cannot handle the pressures of major league coaching. Each consultant needs to sense the level at which he can perform best and resist the urge to overreach his competence.

Learning at the client's expense is sometimes necessary and always risky. In sports, the competitor is always trying new plays, which a coach is expected to counter. The good business coach is regularly faced with novel competitive problems and properly considers the business world a laboratory in which experiments must be made. Yet the consultant must always remember that the client's resources are at risk, so that innovative solutions must be both practical and robust (having fall-back provisions or capable of limiting the damage that could result from failure). Junior consultants should be used within their levels of competence and learn by working with experienced leaders.

One of the most difficult decisions for the consultant-coach is when and how to tell the prospective client: "Sorry, I can't help you. This is beyond or outside my capability." Yet I have had clients come back later and thank me for recommending someone

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else, then give me other assignments more within my field. That brings a much better feeling than to have taken on a job and failed at it.

Understanding the Client's Position

The consultant-coach often faces the question: "Who is my real client?" There may be different clients with different objectives in the same firms. Or there may be a "hidden agenda" within the organization, that may or may not have been explained to you.

Some years ago, I went to India as advisor to a newly formed economic research institute there. Our contract said that I was to assist a staff of young economists and engineers on a series of industrial economics studies related to India's national and state development plans. These were bright people and eager researchers, mostly with more impressive degrees than mine. But, it turned out, they were inexperienced in project planning, in scoping out their research into actionable reports. So, rather than dealing directly with the substance of India's development problems and opportunities, I found myself mostly coaching the staff on how to plan and conduct research projects, including much painful editing of their reports.

But the true hidden agenda went deeper. The institute's leaders, eminent academics, had little practical experience in managing a research organization, a situation that could not be openly

acknowledged. What could not be written into our contract became my major backroom effort - coaching them in the basics of research administration, proposal writing, project budgeting, report production, and personnel evaluation.

Another qualification for a good coach is ability to identify and match the "style" of the client. Even when instigation of change is the reason the client hired you, the coach must first deal with the organization as it is, with all its cultural baggage. Then, as when an athletic coach wishes to install a new "system" for a team, careful attention must be paid to how to bring about such change. A most difficult decision that the coach may share with the CEO is how much change can be effected with the present corporate team or whether new players must be substituted. Then the consultant often becomes the hatchet person to force such changes.

In the USSR, General Secretary Gorbachev's *perestroika* program involves an effort to alter 60 years of habits in which the Soviet bureaucracy has been steeped. Many American corporations are just as strongly set in their ways. So it is important to reach early understanding with the client CEO on just how much change is really wanted and how much pain management is willing to undergo to achieve it.

During 1987, Pacific Bell had hired the Charles Krone organization to conduct a radical retraining program for its large staff, aimed at changing the organization's culture. But enough internal resistance developed to gain attention of the California Public Utilities Commission and force a

public review of the program's effectiveness and costs (which would be passed on to the rate-payers). Ultimately, the program was dropped, after expenditure of several million dollars.

Finally, your coaching style may determine whether you are perceived as a help or a threat to executives and staff within the client organization. Along with "the check is in the mail," a common saying that corporate employees have learned not to believe is "I am a consultant and I am here to help you." The coach who comes on too strongly will get precious little cooperation from those who feel threatened.

Project Management Is Paramount

Finally, the good coach has important qualifications related to project management. These include the ability to choose the proper approach to each coaching assignment, project planning capability, team leadership, and time and budget management. Even if the coach need not be an outstanding performer in the subject field, he or she must demonstrate early on an ability to manage others, who may be more eminent than the head coach in their particular fields.

Choosing the proper approach is the first step in assuring a successful coaching assignment. But the good coach remembers he has two projects to plan - the client's project and the consulting team's project. Planning the client's project involves the setting of realistic measurable goals, determining which of the client's per-

sonnel will be on the project team and how they will be used, and setting the schedule of events. Planning the consulting team's project involves converting the project goals and schedule into consulting resource requirements, then determining their availability, scheduling, and cost.

Leadership is a key factor in coaching. It applies both to leading the client team and, even more delicate, coaching client executives on how they can better lead their team. It also applies to leading the consultant team for maximum cost effectiveness. I have seen a consulting project leader exhibit marvellous rapport with client executives but treat his own team members so shabbily that some resigned before a major project was completed. Another led his enthusiastic consulting team in developing an innovative solution that should have been great for the client, only to arouse so much antagonism in the client organization that the solution was rejected.

The question of time and budget management should not have to be raised, except that so many consulting teams have managed these functions so poorly that their ability as coaches was brought into question: "How can you tell us how to run our business if you can't manage your own?"

Don't Surprise the Client

Early on, I said that communication is the key to good coaching. But it is amazing how many otherwise good teachers - in sports, the arts, and in business - are so

poor in communicating their Knowledge and ideas in ways that will stimulate others to follow.

The first rule is to keep in touch with the client. After all, it's their money you're spending and they have some right to know what you are doing with it. Good coaches don't keep many secrets from their team members, nor from the owners who hire them.

Proposal writing is the touchstone to good communications. Tell the client clearly what you intend to do, how you will do it, and what will be required of the client. Insist on discussing the proposal with the people who later will judge whether the project was successful, so there will be no misunderstanding. Don't promise what you can't deliver and hope the client will have forgotten what you said.

In the early 1980s a colleague and I contracted to prepare a series of seminars to help re-orient employees of a major utility company that was facing deregulation, to prepare them for a more competitive business environment. We had received specifications for the project from the corporate training director, prepared a proposal responsive to the stated objectives, discussed it thoroughly with our contact person, and landed the contract. Only after we developed the syllabus and materials or the opening seminar were we able to schedule a meeting with the senior corporate officer in charge of marketing. It became clear within minutes that he thoroughly disagreed with the stated objectives and our approach, although he had signed off on the contract (apparently without really reading it). When the impasse became obvious, we volunteered to termi-

nate the work immediately; the client had already agreed to pay for the work to date, admitting that the failure in communications was theirs. However, we accepted partial blame for not having insisted more strongly on a direct meeting with the senior executive before the contract was signed.

Keep in touch - you need it; they need it. The "see you in six weeks" approach seldom works well, for the simple reason that the situation under which the assignment began could change in even such a period. A consultant typically wants to meet with the client only when there is some progress to report, and so may delay meetings. The client may defer meeting with the consultant if internal complications are threatening the smooth progress of the project.

"Fight fire fast" was the slogan of my first boss in a marketing position. Cover-ups, fear of being treated as the messenger who is blamed for the bad news, unwillingness to admit you don't know the answer - all will only add fuel to the fire. The client worth keeping will respect the consultant who immediately reports the symptoms of trouble. Blame is something to be sorted out later.

In the best of coaching worlds, troubles encountered during a project are treated as "learning opportunities," in the opinion of Donald N. Michael, author of the book *Learning to Plan, Planning to Learn*. The quarterback who is benched for ineffective play stands beside the coach on the sideline, to observe and learn what went wrong. Then he can go back in and expect to do better next try. Blame and punishment should be resisted, since those who lived through the trouble

now have the experience and should have learned something from it. To fire them for honest mistakes means only to replace them with others who do not yet have the same experience.

Delivering the Goods

A coach's "product" may be delivered in various ways. Probably least effective is the traditional detailed written report. What the client really wants is a working solution, not pounds of paper or even fancy diagrams.

For this reason, the nature of consulting "deliverables" has changed drastically in recent years. The result of a good coaching job may be an actionable plan, ready for implementation, whether covering the full corporate strategy or only improvements in a functional area. It may be a re-trained staff, prepared to meet a changing business environment. It may be a presentation of what was learned in the study, followed by a structured discussion of the alternatives facing the client, then a decision by the chief executive: "Let's do alternative B!" (No written report is ever prepared, other than enough to record the decision.)

As in all coaching, the acid test is not whether a fancy report was delivered or the consultant made a pretty presentation but whether the team won the game.

If the primary purpose of any coaching job is to help the client, a secondary one usually is to obtain follow-on work, either from the same client or by referral to others.

The result of a phase-one study almost always includes recom-

mendations for further work, and properly so. A perceptive coach should see other ways in which the client needs help. And the smart consultant hesitates to tell the client more than what the contract required without further compensation.

Selling the next phase usually depends on the client's satisfaction with the initial work. That is why even an exploratory study should aim at some immediately useful result. The coach who wins one game will be kept on for the season.

No matter how successful, however, there usually comes a time when coach and client should part ways. It may be simply that the client has learned all the coach has to teach. It may be that familiarity erodes the shock value of what a once-outside expert can say, when the expert becomes almost an insider. Or the coach may go stale working too long with the same client team and need new excitement in a new environment.

Count the Ones That Got Away

Good coaches study the game films endlessly, to learn what went wrong and how their team can do better. So it has always amazed me how few companies ever do a serious analysis of lost business. They never stop to ask: "Why didn't that customer call us again?" Most consultants, who should know better, are equally amiss.

One thing I have learned is that the provider of a product or service seldom learns the real reason for lost business directly through

the salesperson responsible for the account. Many client executives are simply too polite to discuss such unpleasant things, unless asked directly and perhaps not even then. In some cases, the salesperson or project leader, who should best know the customer, is not told the true story to avoid personal embarrassment. In others, some hanky-panky may be going on in the client organization that precludes giving an honest answer.

But the firm that really wants to know can find out, perhaps months later and through circuitous channels, the real reason for a lost account. That, too, can be a learning experience and one that the serious coach must undertake if there is to be continuing improvement in the consulting organization. In rare cases, even consulting firms hire an objective marketing consultant to make a lost business survey, learning in the process some fascinating things about themselves.

Then, the leaders of the consulting firm have a basis to do some coaching within their own ranks.

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