Check Yourself: Putting Use of Self Into Practice

***Use of Self** is bringing full awareness of self, others, and the context while drawing on knowledge from experience and evidence to be most helpful in the present situation. Effective use of self requires consultants to be clear about their intentions and purposefully manage their actions.*

Developing and honing use of self happens through both *introspection* and *interaction*. There are numerous opportunities to intentionally activate, learn from, and master your use of self in each phase of a typical workflow — before, during, and after specific engagements. This tool includes sample reflection questions to help you plan, monitor, and learn from your use of self through all phases of your work. The tool is designed for individuals but can be easily adapted for use with partners, supervisors, or teams.

Questions to Help You Prepare for an Engagement

Before a client engagement, your use of self involves taking stock of what you know about yourself, others, and the context to plan how to be most helpful to your client. You tune into self, get clear on intent, and use informed judgment to design a coherent approach to achieve the desired outcomes.

How do I want to show up and be perceived?

- How does my client expect me to show up in this situation?
- Based on previous experience in similar situations, what expectations do I have for myself?
- How confident do I feel about the upcoming engagement?
- Where does self-doubt come up?

What do I know about myself that could affect my ability to be helpful?

- What strengths will I bring to this work?
- What tends to derail or trigger me when doing this type of work? What strategies will I use to manage myself when that happens?
- How do I feel about the possibility of confronting difficult issues?
- How comfortable am I with not knowing or not being able to control how things will play out?

How prepared am I for the upcoming engagement?

- Do I have sufficient background information about the context and focus of the work?
- What knowledge and experience do I have that will likely be helpful in this situation?
- Should I partner with someone whose lived experience or special expertise complements what I bring to the engagement?
- Are the planned processes and tools appropriate for the context and desired outcomes?
- What roles will I and others play in each part of the engagement?
- What feedback and information will I gather to assess results?

Questions to Guide You in the Moment

During a client engagement, you actively pay attention to and make sense of everything happening around you, including the presence and impact of yourself and others. You are deliberate about choosing which moves you make—anything you say or do (or don't do)—throughout the engagement.

What's happening with me right now?

- Am I fully present in the moment?
- Am I genuinely curious about the people and situation?
- What thoughts, feelings, intuitions, and reactions am I having?

What's happening with others and the situation?

- What effect is the physical environment having on me and my interaction with the group?
- What do I notice about how people interact with one another and with me? How does that interaction affect the flow of the conversation and the work of the group?

How am I making meaning of what's happening?

- What contextual factors (such as previous meetings, culture, history, or policies) should I consider as I make sense of the situation?
- How are my beliefs, values, and subjectivity influencing my sensemaking?

What moves should I make?

- Have I taken in enough information about the situation for deliberate action?
- Am I being intentional about when and how to intervene, ask questions, or offer input?
- What effect are my actions having on the group's ability to move forward?

Questions to Help You Reflect and Grow After an Engagement

Taking the time to reflect on your actions and interactions during a client engagement is a powerful way to grow your use of self. It can also help you more efficiently plan and more effectively conduct your next engagement. In this phase, you use client feedback and your own observations to assess what worked and what didn't. You reflect on your use of self, synthesize new insights about your client system, and make notes for future planning.

How did it go?

- From my perspective, what went well? What didn't go well? Why?
- From the client's perspective, what worked? What didn't work?
- What real-time adjustments needed to be made based on what was happening?

What part did I play in how the engagement went?

- What roles did I step into (for example, process facilitator, coach, content specialist, observer)? Which roles were more comfortable than others?

- In what ways did the factors that shape who I am (such as social upbringing, life experiences, personal identities, deeply held beliefs, assumptions, and mental models) influence my perception of the situation and the moves I made?
- Which of my actions were driven by impulses that I intentionally try to manage (for example, bias, anxiety, perfectionism, desire to control, defense mechanisms, egotism)?
- When did I feel stuck or unsure of what to do next?
- How did my actions and interactions build and reinforce trust?

What are some implications for my use of self as I move forward?

- What new observations did I make to add to my growing understanding of my clients' contexts, needs, and ways of operating?
- How can I learn and improve from both the successful and the less successful aspects of the experience?
- What key gaps in my knowledge and skills do I need to fill?