

## Strategic Advisor vs Consultant vs Coach vs SME vs Trainer. V3

### What is the purpose of this article?

Enable your company's corporate leadership (board of directors, C-Suite, and any controlling shareholders) to discuss the need and value of strategic advisors, coaches, consultants, SMEs, and trainers.

This article does not provide tax, legal or financial advice.

You must do your own research and fact-based analysis using current and relevant information.

AI did not write this article. 100% human written.

### What are the critical learnings in this article?

- 1) The focus of the strategic advisor is helping business leaders learn to solve their critical problems.
- 2) Learning is a biological process of changing your brain structure.
- 3) The best way for you to learn is to create your own conclusions and recommendations based on your own analysis of data.
- 4) The worst way to learn is by reading reports and attending presentations.
- 5) Determine what combination of: strategic advisor, consultants, coaches, SME, and trainers your company needs. Identify which roles can be humans vs AI workers (often referred to as AI Agents or just AI) vs AI

### What are the four ways to compare working strategic advisors, consultants, coaches, SMEs, and trainer?

- 1) Focus: Is it the individual or the company?
- 2) Problems: What are the problems?
- 3) Outcome: What are the outcomes?
- 4) Accountability: What are the accountabilities?

### Let's compare strategic advisors, consultants, coaches and trainers, using examples.

#### Strategic advisors

Focus: The focus of the strategic advisor is helping business leaders learn to solve their critical problems.

Problems: Problem may be unknown, ambiguous, critical to company success or survival

Outcomes: The business leader has learned what to do and has a deep understanding. Problems are identified.

Company survival and success.

Accountability: The business leader is accountable for the decisions and cannot blame the advisor. If a decision turns out poorly. The leader must be open and share the most pressing issues and personal doubts. The advisor must provide absolute confidentiality, ask the hard questions and challenge assumptions. Must help the leader see the bigger picture.

#### Consultants

Focus: The company, division, or project

Problems: Clearly defined problem.

Outcomes: Recommendations, analysis, plans

Accountability: Consultants are accountable for the recommendations and analysis. Business leaders are accountable for the for benefits.

#### Coaches

This is a business coach, not a life or career coach

Focus: The individual

Problems: 360 assessment has identified issues to resolve.

Outcomes: The next 360 assessment shows major improvements.

Accountability: The individual is accountable for learning to change themselves. The coach is accountable for the learning process.

#### SME (Subject Matter Expert) e.g. lawyer

Focus: The individual or the company.

Problems: The problem requires advice based on deep fact-based knowledge, such as a lawyer

Outcomes: The business leader has received both the fact-based advice as well as observation on how others have used the advice.

Accountability: The SME is accountable for sharing fact-based information using the language of the business leader. This enables understanding. The business leader makes the decisions.

## Trainers

Focus: The individual.

Problems: Need to learn new software, need to learn a new sales process

Outcomes: Using new software each day, using the new sales process each day.

Accountability: The trainer delivers the training. Company does follow up to ensure training is being used. Company also ensures training addresses the real problem e.g. no amount of sales training could have persuaded Blackberry users to not switch to Apple iPhones.

### **What is learning?**

Learning is often critical, as noted above.

What is learning?

- 1) Learning is the relatively permanent change in your talent.
- 2) The 10 components of your talent are: Self awareness; character, relationship skills, communications, crystallized intelligence, fluid intelligence, cognitive skills, ability to quickly learn and unlearn, creativity, and physical capabilities.
- 3) All talent is based on the biological structure of your brain i.e. your neurons and the synapses which connect your neurons.
- 4) Learning is a biological process of changing your brain structure. The key changes to enable learning are new connections between neurons and strengthening the connections.

### **What is the best way for you to learn?**

Active learning is the best way to learn. E.g.

- 1) The best way for you to learn is to create your own conclusions and recommendations based on your own analysis of data.
- 2) Coaching or teaching someone else is the second-best way to learn.
- 3) Other good ways to learn are: simulation & role playing, and case study analysis.

All the above approaches engage multiple parts of your brain and make significant changes to your neural connections.

### **What are the worst ways for you to learn?**

The following passive learning approaches don't result in any significant learning i.e. sustainable change in behaviour and knowledge.

- 1) Reading reports
- 2) Attending presentations, lectures

All the above have limited changes to limited parts of your brain. As a result, you gain little deep understanding, long term skills, and knowledge retention. BUT, if you take notes while listening to a presentation or reading documents, your learning is improved.

### **Why is learning hard for you to do, especially if you've been a successful leader?**

Learning also requires unlearning. The world is changing faster than ever before. Crisis and turmoil are never ending. The future is unpredictable.

What are the psychological barriers to your unlearning?

One barrier is: Unlearning is the conscious process of recognizing that your past skills, experience, and mental models are of limited or no value now.

What are the neurological barriers to your unlearning?

One barrier is: When those skills and knowledge that resulted in your success are challenged, your brain triggers the same defensive and emotional stress response as when you are in physical danger.

### **Can everyone learn?**

- 1) Many leaders can learn.
- 2) Many leaders are unable to learn. They cannot overcome their psychological and neurological barriers to learning. One business psychologist told me that many leaders are "hardwired to fail".
- 3) In today's hypercompetitive and turbulent world, the only way for leaders and their companies to succeed is to learn faster and better than competitors.

A strategic advisor will have to end the relationship if it becomes obvious that the business leader cannot or will not learn.

### **What are some characteristics of a strategic advisor?**

The focus of the strategic advisor is helping business leaders learn to solve their critical problems.

Socratic questioning – not giving answers

Active listening – hearing what is not being said – hearing assumptions, biases and fears.

Candor – courage and ability to tell the leader what they need to hear in a way that they can understand.

Comfortable saying “I don’t know”.

Facilitation – guiding the conversation to help the business leader untangle their thoughts

Foresight – help the business leader see the 2<sup>nd</sup> and 3<sup>rd</sup> order long-term consequences of a decision.

Knowing how to explore the unknown.

Recognizing the emotional and political aspects of the business leader’s environment.

Reframing – helping the business leader look at an old problem from a new perspective.

Synthesis – able to listen a long brain dump from the business leader and identify the one or two key points

Total trust – the business leader must feel safe being vulnerable and uncertain.

### **Why do you need Strategic Advisors, Coaches, Consultants, and Trainers?**

- 1) Your leadership talent will not improve by itself.
- 2) In today’s competitive business environment capital is unlimited but talent remains scarce.
- 3) Olympic gold medal winners need world class coaches.
- 4) Sports teams need coaches and trainers.
- 5) All levels of the military have ongoing talent development.
- 6) The best Strategic Advisors, Coaches, Consultants, and Trainers are rarely the best company leaders or the best athletes.

### **What are your next steps?**

- 1) Define the words/concepts you’re using, in a glossary. I’ve seen major confusion when the same words mean different things to different people.
- 2) Assess the types of problems you have and the value of addressing them.
- 3) Determine what combination of: strategic advisor, consultants, coaches, SME, and trainers your company needs.
- 4) Determine which roles can be humans vs AI workers (often referred to as AI Agents or just AI) vs AI.

### **What further reading should you do?**

“What is learning?” Koor and Associates

<https://koorandassociates.org/creating-business-value/why-have-your-minimized-your-talent/>

“What are the core components of talent?” Koor and Associates

<https://koorandassociates.org/2025/09/29/what-are-the-core-components-of-talent-v6/>

“Is your company planning to fail?” I’ve observed that many, if not most, companies are passionately executing their plans to fail.

<http://koorandassociates.org/avoiding-business-failure/is-your-company-planning-to-fail/>