

Designed Learning<sup>SM</sup>

**Information  
Systems  
Helps Clients  
Search  
for  
Solutions**

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# Information Systems Staff Help Clients Search For Solutions

Information Systems professionals in numerous organizations have chosen consulting as their primary way of delivering service to their internal clients. Key to changing the way they work comes from more than keeping up with the rapid changes in hardware and software. Rather, acquiring a new set of consulting skills is key to helping deal successfully with the changing and challenging world of IS.

These professionals realize they no longer add significant value by merely “crunching data and numbers.” They’ve traded sitting in remote or isolated processing centers for working directly with clients all throughout their organization. Their objective is to make a difference in the success of the business units they serve.

These IS departments worked with Designed Learning Inc., a Fanwood NJ consulting/training company to learn a consulting process and develop the skills to create collaborative partnerships with their clients. All members of the various IS departments practiced their skills in workshops conducted at various times in the development process. Real situations participants faced in their work were the practice fields for learning.

Some results achieved include:

- ✓ IS consultants now decide with clients, the best way to do the work.
- ✓ IS consultants are beating competition from outside groups offering the same service.
- ✓ IS consultants are helping move control over what is required for success to the line businesses.
- ✓ IS Consultants utilize a specific phase and stage process for choosing and conducting engagements.
- ✓ Clients are retaining ownership of their problems, not turning them over to IS staff to solve alone.
- ✓ Sources of resistance are acknowledged, named, and dealt with directly and positively.
- ✓ The human and technical issues are separated from one another and resolved.
- ✓ IS consultants can guarantee internal clients 100% satisfaction, or the clients do not have to pay.
- ✓ Consulting skills work with colleagues and subordinates, not just clients.

# Information Systems Staff Help Clients Search For Solutions

Brief Time,

Radical Changes

Over a relatively brief time, the field of information systems has changed radically. “Initially, those of us in IS were data processors crunching numbers for our clients,” says Lisa Halteman, business systems manager for McNeil Consumer Products Company.

“Then we were called MIS people, and charged with developing the computer side of new systems while clients took care of the business side. Today we’re asked to function as

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information technologies professionals--our role is to be in-house

consultants working closely with clients to determine the best way to do the work, and then to define how technology can best help support the doing of the work. I’ve had comments from senior-level people who say, ‘I want an

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throw jargon at me and tell me what I need.”

The changes in the role of information systems have been driven in great part by changes in technology. “IS used to be a back-office operation,” says Tony Singarayar, Group Manager for Business Systems in McNeil’s Information Technology department. “Computers and the people who worked with them weren’t visible to the rest of the organization.” The advent of PCs changed

that-- now the technology is on every desk, accessible to everyone in the organization. To a great degree, the work of IS has been “demystified.”

Economic pressures have also driven the changes along with external forces like international competition and a difficult economy. In response, internal mandates like the perceived need to run “lean and mean” have forced IS to reevaluate its role in today’s organizations.

McNeil’s Eileen Araco, Lead Analyst in the IT department, sees it this way: “Suddenly there’s a proliferation of outside companies providing services, and, in some cases, clients within a company

can go outside the company to get hardware, software, services, and information. IS people who think they can ignore clients’ needs and just go into a room and code all day probably won’t be around very long. The really effective people in this field are the ones who interact well with their clients, adding ideas and value to the search for solutions.”

## **A QUANTUM LEAP IN THINKING**

Many companies agree. With more control and accountability shifting to the line, staff functions such as IS no longer hold a monopoly on providing their services. Control has shifted to line managers who can get the services they want from the competitive marketplace. These companies are requiring that

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their IS people become, in effect, staff consultants around IS issues. That quantum leap in thinking can be represented this way:

### IS in a Monopoly Environment

- works in isolation from the client
- understands only IS
- is “a pair of hands” or “expert”
- focuses on technical fixes
- imposes solutions on clients
- adds technology

- works at building a reputation
- is at risk of becoming obsolete

#### IS in a Competitive Environment

- works closely with the client
- understands the business overall and where IS fits into is a full partner
- looks at whole systems and at how technology can help improve them
- helps clients develop, understand, “own,” and value the solutions
- adds value
- works at building the business
- is a valued member of the team

Those changes are logical, but making them isn't easy-- and it's downright daunting if IS staffers aren't well prepared. “Suddenly I had to work closely with people much higher up in the company than I was,” says Promus's Cynthia Jordon-Putt. “I felt lost and a little intimidated.” Promus owns three hotel chains and a casino chain, and now develops all its own back-office systems, reservation systems, casino systems, and business systems. As a computer-based training/documentation project consultant, Cynthia acts as liaison between programmers and users, making sure users-- the clients-- get what they want, and programmers get what they need. Her department also develops training for Promus software.

Cynthia's situation-- and her discomfort-- aren't unique. One giant California-based computer and peripheral manufacturer decided to

transition its Office Technology staff from “reactive fixers” to becoming consultants on office processes. The Consultants-- who work in field offices across the country-- were positive but hesitant. “It sounded like a good idea,” says Consultant Pam Schellenberger in Michigan, “but we weren't sure exactly what consulting entailed. We knew how to fix printing problems, but we

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didn't know how to be consultants responsible for helping to improve whole processes.”

Promus and McNeil-- a Johnson & Johnson operating company whose products include Tylenol and the California hardware supplier-- are also among the corporations

***“I always felt I'm paid to do my job and put aside my own preferences. But actually it's part of the job to ask for what I want to help the project succeed.”***

who have decided that their IS staffs could best learn staff

consulting skills in a formalized way. They chose a workshop offered by Designed Learning, Inc.

In the Designed Learning model, the consulting process comprises five major phases: entry and contracting, data collection and diagnosis, feedback and the decision to act, implementation, and a final phase that begins with evaluation and moves on to extension, recycling, or termination.

#### **ENTRY AND CONTRACTING**

In contracting, the consultant hears how the customer sees the situation-- but doesn't jump to conclusions. Wants and needs are stated directly and completely by both customer and consultant. Next steps in looking at the problem are discussed, power and control are negotiated and shared, and boundaries are set.

For most IS organizations, that's a new approach. “It wasn't long ago that most IS people would just agree to do whatever the client asked -- even if what

***“IS doesn't do it alone; the customer is a partner. That way, they not only own the solution, they understand the constraints we work under-- and we understand theirs, too.”***

the client asked wasn't the best approach to the problem,” says Tony Singarayar, “and everyone would be disappointed forevermore.” When the

contracting phase is approached correctly, that doesn't happen. "Now we probe and ask for clarification of the issues," says Tony. "We work to develop an understanding of the real problem."

In addition, the consultant tells the client up front what it will take to reach a solution. Many IS people-- in fact, many people in any staff discipline-- find it difficult to be forceful in asking for what they want. "Lots of people, including me, struggled with that," says Lisa Halteman. "I always felt I'm paid to do my job and put aside my own preferences. But actually it's part of the job to ask for what I want to help the project succeed." Kristi Iverson, an Information Technology Unit Manager for the California computer company whose programmers develop and support field accounting systems, says, "When our workshop participants looked at themselves on videotape, there were a lot of 'Aha's.' We were all very 'nice' when we practiced asking for what we wanted, and consequently we weren't as effective as we'd like to be. But I think we learned how to say, 'OK; you want me to do this; here's what I need in order to be effective and work with you to solve this problem.'"

Finally, adds Pam Schellenberger, "During contracting, you need to get a commitment from your customer about how they're going to contribute to solving the problem or improving the process. IS doesn't do it

alone; the customer is a partner. That way, they (the client) not

***"Now I understand I'm dealing with resistance-- with human emotions-- and I know there are effective techniques to help me deal with that."***

only own the solution, they understand the constraints we work under-- and we understand theirs, too."

### **DATA COLLECTION AND DIAGNOSIS**

The next phase in the consulting process is collecting data and making a diagnosis-- the consultant's opportunity to dig deeper and identify the true

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nature and scope of the problem. It's a critical phase, because often the "problem" reported by the client is actually a symptom of a deeper and different problem.

Sometimes, for example, what seems to be a technical problem is at its core a human or organizational issue. It's vital that the consultant collect data in the quantity and quality that will help him or her make a sound, independent diagnosis. This includes a careful consideration

of the political, organizational, and emotional contexts in which the problem exists.

If the contracting phase is well accomplished, the consultant has ready access to the people and information s/he needs.

Once the data are collected and analyzed, the consultant can discern whether the solutions discussed during the contracting phase will work-- or whether different solutions are more appropriate.

### **FEEDBACK AND THE DECISION TO ACT**

Feedback is an extremely important phase. In it, the consultant reports back to the customer, offering a clear, simple, and accurate picture of the situation-- including both its technical and all other aspects as well.

Sometimes, from the customer's point of view, the news is not good--the problems are not what they seemed. Often, the recommendations now offered by the consultant will be quite different from the

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solutions envisioned by the client and consultant during the contracting phase.

It's important to note that consultants are likely to encounter resistance in any-- or all--phases of the process. Dealing with resistance is one

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of the consultant’s most difficult --and most important--tasks. Resistance is “nature’s way” of making it clear that something important is going on. In the feedback phase, clients are often asked to face tough issues and make difficult changes. The client’s initial reaction can be negative. Many consultants have “war stories” about clients who became angry or defensive, or began blaming others, or fell totally silent. Reactions like these--resistance reactions--are simply indirect expressions of deeper concerns.

Consultants learn to confront and defuse resistance, and encourage clients to express concerns directly. That’s necessary because, unless the resistance is confronted, there is little chance of the client’s “buying in” to the proposed solution or taking action to solve the core problem. For the consultant, confronting resistance means “hanging in there” with the client, and moving closer rather than running away.

“That was a big surprise for me,” says Cynthia Jordon-Putt. “Like a lot of other people, I had usually ‘dodged the bullets’ and headed for the door. Now I understand I’m dealing with resistance-- with human emotions-- and I know there are effective techniques to help me deal with that.”

The consultant’s attitude can also make a tough situation easier. “One of the main things I came out of the workshop with is this: you have to be authentic and honest-- but with compassion,” says Eileen Araco. In Washington, Office Technologies Consultant Carol Suess of the computer manufacturer agrees: “A consultant has to support the customer through initial resistance, and (has to) understand the difficulties the customer is facing while keeping in mind that the problem is resolvable. It also helps to remember to give feedback

***“When we improve IS staff consulting skills, we’re really talking about maintaining our basics.”***

on the positive--the ‘good news,’ the things they’re doing well-- and not deliver only ‘bad news.’”

The feedback phase is complex and it takes time--but the stakes are high enough to make the investment worthwhile. “Sometimes these projects make a difference in whether a company survives the next few years,” Carol sums up. “That’s why we, as staff consultants, need to give

***“And it’s a good feeling when the people who used to ask you to fix the printer now call on you to help rework a process.”***

clients the best and most accurate picture possible, in words they understand. You can’t back away just because it’s hard to handle the truth.”

### **IMPLEMENTATION**

This phase, which many people believe to be the most difficult, is actually one of the simplest-- if the first three phases have gone well. Says Cynthia Jordon-Putt, “It’s like being in a play: you’ve learned your lines, the set is up, and everyone knows what to do when-- so actually carrying out the plan, or putting on the play, is the easiest part.”

### **EVALUATION, ETC.**

The last phase in the process begins with evaluation -- a “reality check.” It’s an objective way to see whether the problem has in fact been resolved. Some organizations choose to evaluate informally, through meetings and conversations, others choose a formal approach. For instance, they use written questionnaires or other measurement instruments. Whatever way it’s done, evaluation is a necessity. Evaluation lets all the “players” know whether what they have done has worked. It also provides information helpful in completing the final phase -- making the decision to extend, recycle (renegotiate), or terminate the relationship between consultant and client.

**ESPECIALLY DIFFICULT  
...AND PARTICULARLY  
EASY**

In some ways, learning staff consulting skills is especially difficult for information systems people-- and in some ways it's particularly easy. Most IS people are linear-thinking rationalists whose orientation is mostly technical. Dealing with the uncertainties involved in close partnerships, and with the intense emotions sometimes generated when customers face unwanted change, can be uncomfortable. "Computers can be frustrating, but they're not

***"If we don't provide 100% satisfaction, our internal clients don't pay us. I believe that using staff consulting skills is a great tool in helping us get to that 100%."***

irrational and they don't throw dramatic fits," says Carol Suess.

On the other hand, most IS people have already lived with great change. "IS people are used to abandoning yesterday's familiar environment. In that sense, they're ahead of other disciplines facing change," Carol believes. "When we improve IS staff consulting skills, we're really

***"Defining the desired performance is a great part of what goes on in the***

***contracting phase of staff consulting skills."***

talking about maintaining our basics, while including more human and business variables than IS has dealt with before."

**...BUT DOES IT WORK?**

"There's no question that staff consulting skills work," says Pam Schellenberger. "And it's a good feeling when the people who used to ask you to fix the printer now call on you to help rework a process."

Almost everyone can tell stories about how staff consulting skills helped produce a positive resolution, or turn a difficult situation around. People report using the skills not only with clients, but also with subordinates, colleagues, bosses-- and even at home with spouses and children.

Tony Singarayar is using staff consulting skills as a tool in McNeil's activity-based management and re-engineering efforts. (Those are ways of re-examining work processes and the human activities around them, with an eye toward redesigning the work processes and the cultural and thought processes they impact.) It's a major undertaking, and Tony believes that staff consulting skills are a useful tool. He asks workshop participants to rate their own effectiveness around 24 specific skills, and says he sees a perception of significant improvement as a result of the workshop.

Cynthia Jordon-Putt says the skills have helped her become

"far more comfortable and effective." Promus hotels offer a 100% satisfaction guarantee to customers, and recently the company decided that it would offer the same guarantee to internal clients who fund projects. Says Cynthia, "If we don't provide 100% satisfaction, our internal clients don't pay us. I believe that using staff consulting skills is a great tool in helping us get to that 100%."

Lisa Halteman believes she knows why staff consulting skills work. She recently completed a master's program in human influencing skills. Lisa says human influencing involves two major steps stressed in staff consulting skills: defining the performance you want from the other person, and understanding what the other person values and presenting

***"When the real problem is different from the presenting problem, you can get involved in power struggles."***

things to the person in terms of those values. "Defining the desired performance is a great part of what goes on in the contracting phase of staff consulting skills," she says. "And understanding what the other person values involves listening carefully and making accurate judgments. If you don't get that part right, you get resistance-- but naming the resistance and getting

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it on the table where you can deal with it can help get you past it.”

#### **THERE'S RISK INVOLVED**

While using staff consulting skills usually produces good results, it can involve risk. “That’s something we looked at in the workshop,” says Kristi Iverson. “When the real problem is different from the presenting problem, you can get involved in power struggles. They can usually be resolved-- but sometimes you might not be able to be successful; sometimes you might be risking failure that could hurt your career. Then you have to ask yourself, ‘Is this worth it to me? Would I truly rather be a partner than a pair of hands? Or can I live with doing what this customer demands even though it won’t solve the real problem?’ You have to answer that question for yourself. Personally, I think you have to choose your battles, and understand that you can’t win all the time...”

When human beings are involved, there will always be elements of change, conflict, uncertainty, and risk. And, in business as in life, there is no such thing as a panacea.

But there are positive, productive ways to deal with today’s difficult business environment. Says Eileen Araco, “Developing new, broader skills-- like staff consulting skills-- is an invaluable asset for anyone. It’s helpful in your own effectiveness

on the job and, frankly, in political survival. Let’s face it, IS people can’t afford to be seen as just ‘bitheads’ any more...”

Once, during a meeting, an angered executive exploded. Flinging his pen across the room, he rejected the systems solution presented by the IS Department. Cynthia Jordon-Putt assessed the situation quickly. Taking a deep breath and reaching into her consulting skills, she looked the executive in the eye and responded calmly and productively. “Jim”, she said, “It’s clear we’ve got a problem. Let’s resolve it before we go on with anything else...”

Cynthia recalls, “When I acknowledged his anger and asked him to talk about it he opened up -- he’d been worried that the new system we were developing wouldn’t include some capabilities he wanted, and he was feeling “railroaded” into accepting something less. We explained that we had the same frustrations; we’d like a perfect system, too, but the time frames wouldn’t allow that. We assured him that we’d keep working with him on additional capabilities, and he knew we’d do what we said -- our relationship includes a good level of trust. Now we’re doing what we said we’d do, and things are working out well...”

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