

Designed LearningSM

**Consulting
Skills
Help Trainers
Make
Transition**



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Consulting Skills Help Trainers Make Transition

The training function, like many other aspects of the business world, is changing rapidly and fundamentally. Gone are the days when trainers could succeed by offering a standard menu of “one-size-fits-all” programs to a “captive audience.”

TRAINERS FACE NEW CHALLENGES

Today’s trainers face myriad new challenges. For instance, some are now expected to:

- take a strong hand in helping to implement organizational strategies such as quality and empowerment
- change organizational culture and values
- transform the training department from an overhead item into a profit center
- discover training and developmental needs and create appropriate learning responses
- shift from *‘deliverers of expertise and services’*, into being *‘consultants to managers’* about what managers must do to make sure proper training occurs
- even compete with outside organizations offering a range of training programs and services.

At the same time these expectations are changing, many internal managers still see

training and trainers in the old way. Often, they still expect trainers to implement standard programs on demand, even if those programs will address only symptoms and not root problems.

How do today’s training professionals help their organizations move in these new directions? How can trainers themselves better understand their emerging role as consultants?

Why do some trainers manage to achieve maximum impact and influence, while others have difficulty breaking out of the old ways of working?

In many cases, today’s most effective trainers are learning a set of skills beyond the usual technical and interpersonal capabilities: They’ve learned “consulting skills.”

INFLUENCE BUT NOT CONTROL

Simply put, consulting skills are the key to getting expertise used.

“A consultant is a person in a position to have some influence over an individual, a group, or an organization – but has no direct power to make changes or implement programs,” writes Peter Block in his book **Flawless Consulting**. *“It takes leverage and impact to get our expertise used and our recommendations accepted.”*

By the Block definition, most people in staff roles, including those in the training function, are consultants. They can advise,

recommend, and plan. But they themselves cannot implement. The choice to implement or not is up to the client, and the decision depends in great measure on the “leverage and impact” of the consultant.

“Many trainers know the content but they don’t know how to use it with management, and management therefore doesn’t perceive them as being effective.”

That’s a new model for many in the in-house training role, and it helps explain why many client managers don’t take, or even seek recommendations from trainers.

Cecelia Horwitz, Education and Organization Consultant for Eastman Kodak Company, states: *“Many trainers know the content but they don’t know how to use it with management, and management therefore doesn’t perceive them as being effective.”*

“EXPERT” OR “PAIR OF HANDS”

Jeff McCollum, Education Director for AT&T Consumer Products, adds: *“Often, clients look at trainers in one of two ways. You’re either an ‘expert’ called in to take responsibility and ‘fix the problem’, or you’re a ‘pair of hands’ summoned to apply a solution the client has already decided on. Usually,*

neither of those works very well, for either the trainer or the client.” It’s not always easy for trainers to move beyond those traditional, limited roles to become effective consultants. But it is possible.

Rick Osborne is one of a group of Kodak Canada Inc. (KCI) line managers selected a few years ago to do training as consultants. The managers will eventually rotate back into the line, and be replaced by a new group of consultant trainers. Development Consultant, Osborne recalls, *“At Kodak, the traditional view of training was the same as at many corporations. Managers would call in training people and tell them what the answer was, and perhaps have them gather data to justify the answer.”*

IT DOESN’T HAVE TO BE THAT WAY

“I thought that was the way it had to be!” Rick continues, “But over time I realized there could be much more to the training role. Learning consulting skills lets trainers move away from being ‘yes persons’ and toward being partners with the client, looking together for real solutions to the real problems.”

AT&T’s McCollum agrees: *“One of the keys to functioning as a consultant is to develop a partnership with the client; that way, the client is more invested, more committed. If the partnership exists from the beginning,*

the client is engaged from the top and more likely to own, and act on, the outcomes.”

“I thought that was the way it had to be! But over time I realized there could be much more to the training role.”

The processes taught by Designed Learning Workshops specifies two major components:

- always being authentic with the client by putting into words the experience of dealing with the clients
- completing each of the five steps of the consulting process.

STEPS IN THE PROCESS

Completing each of the five steps in the consulting process is as important as being authentic. Marilyn Kobus, a Management Education Consultant for Digital Equipment Corporation, calls the steps *“a terrific framework, an excellent way to organize the process.”*

The **first step, contracting**, is probably the most important, since it sets up the “ground rules”: the roles and responsibilities, the expectations, and the boundaries.

The contract doesn’t have to be written, but it does have to be explicit. If it’s not crystal-clear, the entire project could be jeopardized. Most experienced consultants say that, when they review their failures, they realize the problems stemmed from poor contracting.

‘WELL BEGUN IS HALF DONE...’

“I always remember the old adage, ‘Well begun is half done’,” says Jeff McCollum. “The contracting stage can begin the process well. When you’re functioning as a consultant, it’s where you make it clear that you’re not just a ‘captive supplier”. It’s where you say what your needs are, for instance, access to information and to the client’s time, in order to ensure a good outcome.”

What happens when a client won’t agree to provide what the consultant knows is necessary to get the job done? Or when a client asks for a training program the consultant believes won’t get to the root of the problem?

“You have to ‘know when to hold and know when to fold’”, says Kodak’s Horwitz. “And when you’re functioning as a consultant, you know it’s sometimes OK to say, ‘I understand what you’re trying to achieve, but what you’re doing here won’t get you there, and it may be harmful to the effort. I’m not comfortable professionally supporting this.’” Rick Osborne adds, “As long as your own manager understands and supports what you’re doing, the whole organization gains in the long run.”

The **second step** in the consulting process is making the **diagnosis** through **data collection** and **analysis** – coming up with the consultant’s own “sense of the problem.” That, of course, requires access, to people and to

information, and that access should have been arranged during the contracting phase.

FEEDBACK AND RESISTANCE

The **third step** involves **feedback** to the client, and the decision to act – in other words, planning. The consultant reports findings, and works with the client to set ultimate goals for the project and map out action steps.

“When you’re functioning as a consultant, it’s where you make it clear that you’re not just a ‘captive supplier’.”

Here, too, the **issue of resistance** is most likely to arise. This happens when a client feels uncomfortable with the consultant’s conclusions. *“Resistance is tough,”* says Rick Osborne. *“In a traditional training situation, a client resisting your conclusions or recommendations can throw the whole project off the track. But when you’re working as partners, you’re far more likely to be able to name and defuse the resistance, and keep the project moving in the right direction.”*

Cecelia Horwitz agrees, saying, *“Consulting skills can help engender the confidence to deal with situations like that.”*

The **fourth phase** in the consulting process is **implementation**, carrying out the plan. Often, implementation is the responsibility of the line

organization; in other cases, the consultant’s involvement may be heavy.

The **fifth and final phase** involves **evaluation** and **appropriate follow-through**. Did the project work? Should it be more widely applied in the organization? Should it be terminated? Did it deal with the “real” problem at hand, or should a new project, with a new contract, be initiated? Since implementation and evaluation are so project-specific, the consultant’s guidelines here are more general: be authentic, and carry out the terms of the contract.

THE BIG QUESTION

No matter how much sense it makes in theory, any model, approach or paradigm is worthless until it’s answered the big question: DOES IT WORK IN THE “REAL WORLD”? Those who practice the consulting skills model believe the answer is “yes.”

“But when you’re working as partners, you’re far more likely to be able to name and defuse the resistance, and keep the project moving in the right direction”.

“At first, clients look at you like you’re from Mars,” says Rick Osborne. *“But then they come around. My vice president for manufacturing has gone from*

doing 80 percent of the talking while we’re together to doing 50 percent. Now he gives me the annual operational plan and the three-to-five-year business plan. We work together to build an educational and development strategy to complement them. That’s a big change...”

“My vice president for manufacturing has gone from doing 80 percent of the talking when we’re together to doing 50 percent.”

Marilyn Kobus of Digital, where the consulting skills program is offered widely to employees, believes *“the result of using consulting skills is better quality, more on-target results. When client and consultant truly collaborate, what comes out of that is greater than either: it’s synergy.”*

Cecelia Horwitz clearly states: *“the skills of the consultant aren’t all you need; you’ve got to understand the client’s business, and business in general. But the skills are very useful in every interaction, because they focus on understanding where the other person is coming from, clarifying the issues, holding off judgment, and being truthful.”* Cecelia concludes: *“You have to realize that the acquisition of skills like these isn’t an event; it’s a journey. And a journey worth taking.”*

WORDS FROM AN 'OLD PRO'

As a training professional of many years I want to say I care about the bottom line and the people living in my organization. I am concerned about the business and it's results, as well as the individuals within the organization. I want to make a difference and make a contribution.

I am concerned about being viewed as "only staff" and as one dealing only with the soft side of organization life. I am tired of being the expert to whom "people" problems are passed. Unless we, and I do mean we, as line and staff, can work together for the increased skills of our people, the organization will fail.

I do not want to be seen as the college prof, or the teacher, to whom people are sent "to be learned". I want to be seen as relevant, essential to the core business, and as a partner, capable of making a difference.

What I need to learn to do better is to "partner" with my colleagues on the business side to help them see the contribution I can make. I want to consult with them so my expertise can be used for the benefit of all. I prefer not being the expert called in to fix things. Rather, I want to be an equal in search of solutions to all our complex business questions.
AND THE TIME IS NOW!

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