



Paul Kearns defines a new role for a new type of learning professional and business partner.

Part 10: Why learning consultants are always consulted

Here we are at Part 10 of this series, almost on the home straight, and we have only just arrived at a point where we can take a look, specifically, at the consultancy elements of the learning consultant's role. Outstanding learning consultants (LCs) are few and far between because the range of personal attributes, skills and knowledge required to do the job effectively demands an awful lot from one individual. But when the job is done well it can add enormous value and that is why LCs are worth their weight in gold.

So what do LCs need to do if they are to successfully fulfil the consultancy side of their job? An absolute must for any LC is to achieve a very high level of personal credibility, otherwise why would anyone want to consult you? Credibility comes from:

- knowing your subject (that is, learning)
- understanding the business as well as any operational manager
- having the right attitude, and
- being assertive.

Credibility also comes from making sure you are consulted at the earliest opportunity (see where you need to be in the business planning process in Part 7 of this series). By now managers will be expecting to have to work more closely with you and will already have started to value your advice. All of this will aid your personal standing in the organisation, but let us take a closer look at this consultant's role and consider what other skills you might need to develop and hone.

WHAT IS THE ROLE OF A CONSULTANT?

As with any skills analysis, first we have to be absolutely clear of the role. Defining the role of a consultant is a notoriously difficult task, so here is a working definition of a learning consultant as opposed to any other type of consultant.

Learning consultants are those who are sought out for their wise counsel because they are recognised as offering valuable, specialist expertise and pragmatic advice on how the organisation can learn to improve effectiveness and performance.

It would be unlikely for any definition to be agreed unanimously, but let us at least pick out the key words.

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- **'sought out'**

No one will seek you out if they are not conscious that they need your help or are unaware of your existence.

- **'wise counsel'**

This is meant to denote much more than just good advice; it implies experience and sound judgement.

- **'valuable expertise'**

The person who needs to consult with you recognises that your expertise is proven and will add actual value to the organisation. S/he does not expect to get any hair-brained ideas or some woolly answer.

- **'specialist'**

No consultant can be a 'master' of all trades. The word 'consultant' implies in-depth knowledge gained from a very clear focus on a relatively specific field – in this case, learning.

- **'pragmatic advice'**

Your advice has to work in the prevailing circumstances, not just in theory.

- **'effectiveness and performance'**

Everything you do should have performance as the ultimate aim.

Of course, you will have to earn your stripes as an LC, especially with those who already think they know everything there is to know about training and development.

THE 'CUSTOMER' ISN'T ALWAYS RIGHT

As a consultant myself, if anyone really wants to annoy me all they have to do is belittle my 25 years of experience in the training and development profession. This actually happens quite often. No manager from any other function – be it sales, finance, production or research and development – would expect an LC to be able to tell them how to do their job, yet they all think they know something about the subject of training and



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development. That's because they have all received training in the past and sanctioned it for their staff. But to many of them, training is nothing more than being in a classroom, reading a book or sitting in front of a screen. Such people will take some convincing that there really is much more to the job than that. They will need to be convinced that they need an LC.

In the worst cases the arrogance of such managers leads them to think that anyone can put together a training programme. As long as they say what they want, someone in the training team will oblige. (That's about Stage 1 on the maturity scale – see Part 1.) There is a simple exercise for any budding LCs who have this problem that ➤

- should rid them, once and for all, of this perception that 'anyone can do a bit of training'.

Ask such managers to suggest something that their staff need to learn, but tell them this has to be framed as a learning statement. So, if they say 'I want my staff to communicate better with each other' you might re-phrase it for them as 'Staff need to *learn* how to improve their communication skills'.

Now you can ask the question: 'If we are going to organise some way for staff to learn this, what do you think will influence its effectiveness?' This is likely to produce a puzzled look because those managers who thought they knew everything about training usually know very little about the subject of learning. So help out with a few possibilities. Here are the four I normally start with.

Influencers of learning effectiveness

1. Commitment and motivation of learner

Does the manager think the level of personal motivation will be important? If, for example, his/her staff think they are already good communicators, would they be expecting to learn anything? Also, even if staff did learn how to communicate better, (for example, writing clearer e-mails or more concise reports) would they really take the time and trouble to do so? While the manager is trying to come up with an answer you could also point out that if this is a serious consideration s/he might like to come up with some ideas on how to check levels of commitment and motivation first.

2. Accurate training needs analysis and design

The second possible influence challenges the manager's own analysis of what is required. Of course, if the diagnosis of the training need is wrong then the learning design is bound to be totally ineffective. Is the manager sure it is a communication problem? What else might be causing problems? It is also worth pointing out at this stage that the learning process is like any chain: it is only as strong as its weakest link. Failure in any one of these influencers will inevitably result in learning failure.

By now it will be abundantly clear to the manager that there is much more to this learning game than meets the eye.

3. Method of delivery

This next possible influence is particularly interesting. As I have already pointed out, many managers only see training in terms of its method of delivery – that is, they see the training course or the online module as the 'training'. They do not think in terms of a complete learning cycle that has to be integrated with the way they operate. Nevertheless, they will have to admit that poor delivery is bound to undermine the learning process.

As a short but fascinating digression, I present the idea of learning influencers on many of my workshops for training professionals and I ask participants to take a vote on what they regard as the most important influencer of the four mentioned here. The results of the vote are invariably the same: 'delivery' always gets the lowest vote and on some occasions gets no votes at all. Good trainers know there is much more to learning effectiveness than just how well the content is delivered.

4. Evaluation and ROI

The fourth possible influence is one that will be entirely new to the manager. As s/he will know very little, if anything, about training evaluation s/he is unlikely to see any connection. So, to check this out

CASE STUDY: 'Finance director – meet your learning consultant'

Working with a large call centre operation towards achieving the Investor in People (IIP) standard, it was quite obvious that the organisation was very immature from a learning perspective. This resulted in training and development activity that was not aligned with real business needs. I asked the head of Training if he could arrange for me to see the finance director to discuss some of the real business issues, but was told he would not have time as he was relatively new and was still busy getting up to speed. I persisted and was told that I could have five minutes with him.

The impatient look that greeted me did not bode well and the finance director's attitude was clear when he sneered, 'So you're a training consultant?' I stopped him in his tracks and said I was not a training consultant, I was a business consultant and I wanted to speak to him about some problems the company might be having with employee productivity. His attitude completely changed and he shut the door behind us as he ushered me into his office. He told me that it was really great to meet someone who had identified the productivity issue because he was having no success in getting the managing director to recognise it as a really serious problem.

We looked at the declining productivity figures over the preceding two years and started an analysis of why this was happening. One of the developmental issues that immediately rose to the surface was the inability of supervisors and line managers to balance what appeared to be conflicting objectives. They were suffering from high staff turnover and desperate to recruit new staff, but were afraid to emphasise the productivity levels required in case they put off any potential recruits.

I suggested we might be able to design something to help them get the best of both worlds but with the ultimate aim of raising productivity levels to an acceptable, and profitable, level.

all you need to do is ask the manager what value a communications course (let us just assume s/he wants a communications course) might add if it were really successful?

You might get a vague response suggesting that improved communications is bound to add value, but you need to push on this one. If the manager is so convinced communications make such a difference, why doesn't s/he have a stab at putting an actual value on it. How much has poor communication cost the business, for example?



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Whether you get a straight answer to this or not doesn't matter. The point here is that if no one knows exactly how communications are going to improve the performance of an organisation, then how motivated and committed will the learners be? This also reinforces the idea that all of these influencers are actually interconnected.

At some stage there might be an admission of defeat by the manager. You might have convinced him or her that learning is a much bigger subject than s/he thought, with many other considerations involved. However, nobody likes a know-it-all, so you need to ensure you have started to build a constructive relationship with this new 'customer' of yours.

THE CONSULTANT'S RELATIONSHIP WITH THE CUSTOMER

As a frequent public speaker I have been subjected to a wide range of introductions from the conference chair, not all of them entirely flattering. On occasions, though, I have been referred to as an 'expert' and even once or twice as a 'guru'.

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I would not choose or own up to either of these titles, not out of false modesty, but because I am not comfortable with them. They can be dangerous epithets to have to live with. I would almost guarantee that there will be a self-proclaimed expert in the audience who wants to challenge me in public just to demonstrate his or her own superior knowledge. Conversely, those in the audience who have little knowledge of the subject will jump to the conclusion that only very complicated subjects require the services of a guru, and feel dejected and diffident before they even start to listen. Neither perception is particularly helpful to a consultant, either on the conference circuit or in-house.

Consequently, while line managers should value your expertise, they should neither be overawed nor meekly bow down to it. This is not meant to be an ego trip for the LC. Managers need to be fully engaged in any learning discussion because they will have to be instrumental in making learning happen.

Equally, they should not be demoralised by the thought of the subject matter being too difficult. A good consultant will tell a manager that the principles of learning are simple and be patient in explaining the 'rules of the game' until s/he is sure they are sufficiently understood. A 'cowboy' consultant will tell a manager that the subject is very difficult, partly out of a misplaced sense of self-importance but also as a cynical attempt to justify a large (and probably unwarranted) fee.

Managing expectations is crucial in the consulting relationship. Always under-promise and over-deliver. This is probably precisely the opposite approach to many conventional training providers. Look at the back-peddalling that took place in e-learning when it was realised the technology was never going to fundamentally change the way people learn or completely replace tutor-led training and development. E-learning as a universal

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panacea soon gave way to the concept of a blended approach. It is very easy to let your natural enthusiasm run away with you when someone is looking for training. LCs take a much more sober view during their initial analysis. They will only get excited when they can see what value the learning will add.

Also, if the problem to be resolved is outside of the LC's expertise (for example, disaster planning suddenly comes onto the agenda) then this should be acknowledged and further help sought. An open admission of ignorance may cause a certain amount of customer frustration, but it is usually respected in the long run and helps to build trust, not undermine it. Likewise, if the client is genuinely not up to the task of understanding the complexities of the issues involved, then an LC will have to address these issues by referring the matter to a higher or more capable authority.

Perhaps one golden rule for any consultant is not to try to do the manager's job. However close the relationship might be, and even if the consultant is more capable than the manager, s/he should never offer to do the job for the manager or allow the manager to abdicate his/her responsibilities in learning.

So much for describing what the relationship might look like. Now let's get back to something more straightforward – some standard questions that consultants need to ask.

► SEVEN KEY QUESTIONS

One conventional approach to employee development is the use of appraisal or personal development plans. This discussion is meant to act as a bridge that connects operational needs to training delivery via the needs of the individual. Anyone who has installed such systems soon realises that the whole edifice rests on the ability of the line manager to produce an accurate training needs analysis. This is a skill that many managers have not acquired and such organisations are still only at a Stage 2 level of maturity.

This series doesn't allow me to spend much time on how to improve line managers' skills at analysing learning needs, but having some key questions ready might be a good place to start.

What exactly is the employee's job?

Regardless of what the job description says, at what level is this individual working? Who is s/he dealing with and what is the scope of his/her role? To whom does the individual report and where does this person's authority stop?

What knowledge/qualifications do you need?

Can specific knowledge and qualification requirements be clearly established from the role analysis? Is the organisation leaving itself open to risk if individuals do not have particular certificates or qualifications?

What skills do you need?

What skills do individuals have and what else do they need? Notice that we are excluding personal attributes here. If someone has just been promoted into a customer-facing role we would hope that person was selected on the basis of possessing the attributes required.

What experience do you need?

We can then move on to experience. There is a world of difference between the customer service adviser with one month's experience and those with more than two years' experience. How can the employee benefit from this wealth of experience without having to wait for two years and learn by his/her mistakes?

What are your key (strategic) business objectives?

This starts to broaden the learning discussion. Ideally, everyone in an organisation should be clear about what the strategy of the organisation means for them personally. Is the organisation resisting returns of goods at all costs or does it have a very flexible returns policy?

What are your own performance (operational) objectives?

The strategic imperatives should be reflected in the performance measures used. What performance measures are in place for this individual and how is s/he coping?

What is likely to change in the near future?

We need to keep one eye on the future from a learning perspective. What might the individual need to know that s/he does not currently know?

Action points on why learning consultants are always consulted

- See how many more influencers of learning effectiveness you can come up with. You might be surprised at the length of the list.
- Consider your existing relationship with line managers and try to identify those who treat you as a 'servant' rather than respect your advice. Try out the learning influence exercise (see page 68) next time you have a meeting with a line manager.
- If you have ever used a consultant with whom you had a particularly good relationship try to identify the key elements of the person's consulting style and manner that impressed you. Could you do the same for your customers?

Every part of this series has aimed to build your confidence to act as a *learning* consultant. In Part 11 we go even further along the maturity scale by asking whether you want to move into an area of actual *business* consultancy, working as a fully fledged business partner. 🗣️

WHAT THIS SERIES COVERS

- Part 1 – January: How learning consultants bring maturity to the organisation*
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- Part 3 – March: The attitude of learning consultants*
- Part 4 – April: How learning consultants become proficient 'cyclists'*
- Part 5 – May: How learning consultants can use evaluation intelligently*
- Part 6 – June: How learning consultants become performance managers*
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