



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

Part 3: The attitude of learning consultants

In Parts 1 and 2 of this series we saw how learning consultants (LCs) have to help their organisations mature and take a strategic view of learning. By doing so their role changes fundamentally from one of supporting the organisation to leading it. This inevitably means that LCs will have to develop extra, different skills to those required in a more conventional training role – and we will cover these in later parts of this series. In Part 3, I would like to focus on bringing some different personality traits to the fore, which I will refer to as ‘attitude’. So what sort of attitude might we be referring to?

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By their nature most stand-up trainers have to be quite personable and highly responsive to requests for help. By and large, trainers also tend to be enthusiastic. How else could they inspire, encourage and persuade people to learn? They have to get on with everybody, be good listeners and be flexible enough to adapt their programmes to the disparate needs of their trainees.

These are all very admirable qualities, so it is with some reluctance that I now suggest they and the rest of their training colleagues should adopt what might appear to be a slightly more rigid and less flexible position. But it is all in a good cause: increased professionalism and enhanced organisational learning. If LCs want to help shape the organisations they work for, then they need to be taken seriously – and this is only likely to happen if they take themselves and their work very seriously indeed.

HOW SERIOUS ARE YOU?

Do you believe you take training seriously? Admittedly that is a ‘how long is a piece of string?’ question, but maybe you have to draw the line somewhere. A colleague of mine, a senior training manager, was once asked whether he could provide some of his outdoor training equipment for an ‘It’s a knockout’ fun day for the company’s employees. He refused point blank. The sales manager who was



actually organising the day was both amazed and annoyed by this response. The training manager explained his main reason for refusing was that this equipment had a serious purpose – learning – and he did not want any confusion created in the minds of employees between what constitutes learning and pure, harmless fun. Additionally, he did not want to undermine his own training team who were trained as facilitators in using this equipment.

Now, whether you agree or disagree with the training manager's attitude you have to admit that the sales manager had to reconsider his perception of the importance of learning and the role of the training team. In my experience, people who take their own jobs extremely seriously have to be taken seriously by their business colleagues. This is a very important lesson for those who want to become LCs, and we can look at this issue from several different angles.

Equal partner

First, we are going to consider the LC as an equal partner with other managers in the business. An LC cannot afford to be treated as a 'servant to the line'. Even though LCs may not have the same notional seniority as, say, sales directors, whenever the subject of learning is being discussed they must be regarded as equal in status.

This will be dependent, in part, on their own personal credibility and how much a sales director values their expertise; but it should not have to rely on that alone.

LCs should not have to go into meetings on learning matters preoccupied by the possibility that they will have rank pulled on them. They should be confident that their views will be given sufficient weight. If nothing else, they should have a belief in learning as a mainstream, organisational activity and adopt an attitude that says their work is of equal importance to any other line function.



If delegates on a leadership programme have no way of measuring their leadership ability they will never know if they have improved

Principled

We can also view how seriously organisations take the subject of training and learning by asking whether they work to a set of principles and to what extent they stick to them. So what principles ►

► might we be referring to? For what they are worth, here are some that I adhere to, as I firmly believe all learning should be:

- part of a learning strategy
- business focused and aiming to add value
- based on closed-loop feedback (see Part 2 of this series for more information)
- individually tailored.

Like all principles (for example, honesty is the best policy), no one sticks to them 100 per cent but when decisions have to be made principles should be the first consideration. This is of immediate practical use to the LC. For example, what would you say to an employee looking for support for an MBA programme if the employee could not show any benefit to the



The main aim of an assertive attitude is to be prepared to **stand your ground and say 'No'**

business? My principle of business focus and added value suggests I would have no hesitation in saying 'No'. My principle of individual tailoring would also mean I would have to resist any request by a senior manager to 'send everyone' on a particular course. Generic training modules do not fit with these principles at all.

Consider these principles for a few moments and try to write down your own list. Of course, there is no point in LCs having a set of their own principles if their internal customers do not agree with them. LCs would just be seen as obstructive. Everyone has to buy into the same set of principles and if LCs take the lead on this they will be seen as having integrity and standards, not people who have a *bad* attitude.

Results orientated

Closely allied to my own principles is an attitude of results-orientation. Whenever I am discussing learning with anyone I want to know what results are expected, and this should be made clear right at the beginning of the discussion – otherwise why are we discussing it at all?

Now, there will probably be quite a few times during this series when some readers will disagree with my vision of an LC and the learning organisation s/he aims to develop. This is probably one of them.

All training professionals have their own belief systems, and so do the managers and employees we have to work with. Take the whole thorny subject of leadership. Are leaders born or made? Where do nature and nurture come into the equation? How do we know when we have good leadership? What difference does it make to the organisation? These questions have been asked ever since I came into training 25 years ago and probably many more years before that. The only thing I can say for certain on the subject of leadership is

that no one has all the answers and we would probably never reach unanimity.

Let us not get bogged down any further in the debate. From a practical point of view LCs have to decide where they stand on this issue. I think all of my clients run some sort of leadership programme. None of them, as far as I am aware, can point to any clear measures or results that they can attribute to these programmes. Without closing the loop they are never going to know whether their leadership is improving or not.

My own attitude is that if delegates on a leadership programme have no way of measuring their leadership ability they will never know if they have improved. If they cannot close the loop they cannot learn what works for them and what does not. These are really serious questions for senior level, development programmes. Moreover, when we come to look at evaluation in Part 5 of this series, we will see what a difference a results orientation can make.

Dissatisfied

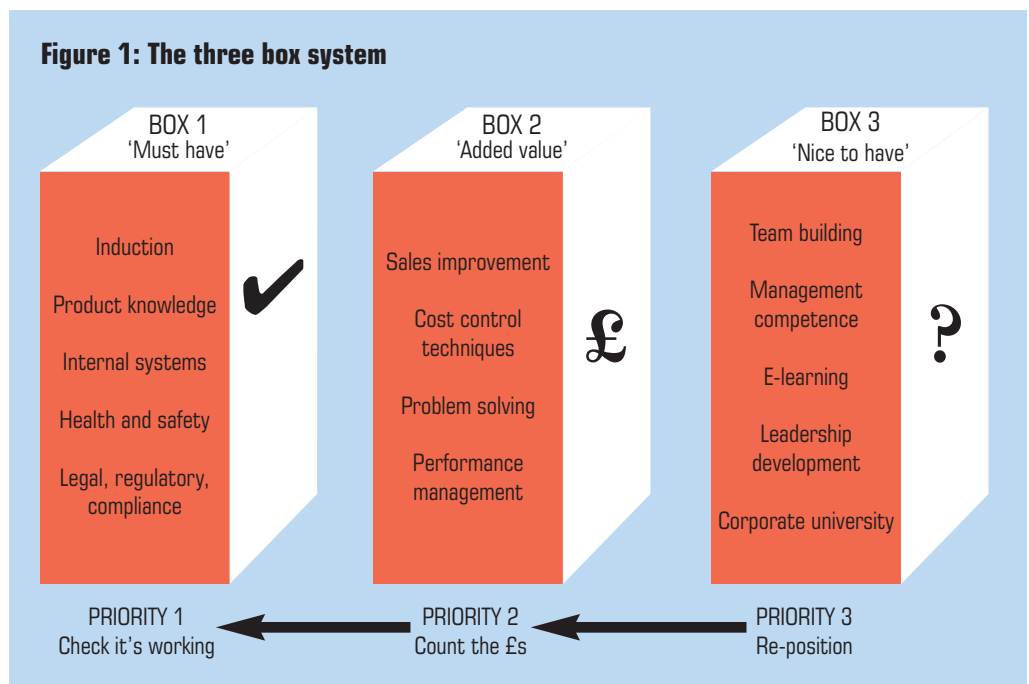
The first three attitudinal issues raised can be adopted by anyone wanting to be an LC. But I'm not so sure about this one. It was probably my own, personal attitude of never being satisfied with the status quo that led me to develop a very different approach to training and learning. The desire always to improve is probably in your blood and if it isn't, then I am not sure what you can do about it. Maybe, as a learning specialist, I have come to accept that there are limitations on what we can achieve.

Fortunately, this particular attitude is not crucial for one very simple reason. Even if you are not desperate to improve your organisation, then your CEO probably is. As long as there is pressure to improve coming from senior quarters, then LCs do not have to pick up this particular baton. They can just run with it, although it does help to have a natural enthusiasm for never-ending improvement and progress.

Assertive and persistent

Two words that often seem to get confused are 'simple' and 'easy'. I hope all of the ideas in this series are *simple* to understand, but I am very conscious not to give the impression that they are *easy* to put

Figure 1: The three box system



CASE STUDY: Using the three-box system to show senior managers you mean business

It took five minutes to explain the three box system at a first meeting with a senior line manager in a bank, who controlled a large training budget. He immediately understood the difference between the boxes without having to have all the theory explained in detail. I then asked him what priority he would put on each box.

The theory of the three box system suggests that Box 1 is the top priority – you have to learn how to keep your head above water before you can swim. Nevertheless, the senior line manager said he wanted as much of his training spend as possible going into Box 2 because, as a business person, he could see this would give him an edge and the greatest return.

I asked the manager how much he wanted to spend in Box 3. He laughed and said: 'Nothing – that's a no-brainer'. I agreed wholeheartedly that it was a no-brainer, but advised him that we now had to do some serious talking about his existing training that had fallen into Box 3. He had had his first taste of an LC with attitude.

into practice. Any change requires effort, persuasion and persistence. LCs have to assert themselves and there are many ways to develop personal assertiveness.

Assertiveness is said to be the mid-point of the scale from submissive to aggressive. Whether that is true or not I have to admit that I can sometimes veer towards the aggressive side of the scale in my own pursuit of organisational learning. Whichever methods you choose the main aim of an assertive attitude is to be prepared to stand your ground and say 'No'. You can say it as politely as you like as long as your customers realise that when you say 'No' you mean 'No'!

Why am I so adamant that LCs have to learn to say 'No'? Well let us look at the next attitudinal trait – being analytical.

Analytical

You might consider analysis as a skill rather than an attitude and I would be the first to agree. The only slight problem is that LCs have to assert their right to be analytical in the first place. Anyone reading this article will have had experience of a senior manager asking for a particular programme such as team-building, customer service or something even more nebulous like 'some training to bring about a can-do attitude'. Training teams working at Stage 2 of maturity (see Part 1) then rush off and do their best to produce what their customers want. LCs, however, demand the right to analyse exactly what this senior manager is requesting.

Perhaps you have never viewed it this way but being analytical in such circumstances is a direct challenge to the manager's authority and the manager might not take kindly to this. Only the most assertive LCs will win this argument, though. They will have to be able to refuse to move on this programme until a proper analysis has been undertaken. We will discuss what sort of analysis in several subsequent parts of this series.

Pragmatic and business-like

Having just encouraged you to be more assertive and analytical I now want to balance this with a pragmatic attitude. We have all heard of the phrase 'analysis paralysis', for which the cure can often be worse than the disease. Learning should not be viewed as some intellectual, ivory tower exercise. It should be about finding some practical solutions to even the most difficult organisational issues.

Hard-pressed line managers could perceive all of these 'attitudes', individually, in a negative rather than a positive light. You have to work at making sure this does not happen. Certainly, if the complete picture they get is one of an LC who makes their life more difficult, then you will have lost the battle for their hearts and minds. And just before we move on, there are two additional points worth noting.

First, we have not spent much time looking at the employees' perceptions. For example, if they feel they have an entitlement to some of the training budget they might not welcome too much close analysis of their own learning needs. We will deal with this issue in Parts 6, 8 and 9.

Second, most of my clients want to evaluate their training or produce return-on-investment (ROI) calculations and I always ask them why? Often, the answer is that they have to justify themselves and the money they spend. My reply is that this is entirely the wrong reason for using evaluation. LCs who are doing a good job should never feel the need to justify their existence. Whatever historical baggage they might have to offload, they have enormous potential value to offer their organisations and this should be their attitude. Their aim is improvement, so they do not have to be defensive or apologetic in any way whatsoever.

Now let us move on to a particular tool that enables the LC to make sure everyone takes learning seriously.

THE THREE BOX SYSTEM

Of all the tools I teach trainers the simplest (and easiest) to use is the three box system. It has a multitude of applications but the most important is to check levels of commitment to learning. Choose a piece of training or development you are already running, then try to categorise it by putting it into one of the three boxes shown in Figure 1. To use the system properly you should consider each box in order. The choice of box is critical to learning.

Box 1: 'Must have'

Only put the training into Box 1 if the trainees *have to have* the skills and knowledge that the programme is trying to teach. Usually, Box 1 is reserved for any training done for legal or compliance reasons. However, if you decide that all of your employees need to know a great deal of product knowledge, and you check they have acquired this knowledge, then that could go into this box. So Box 1 is also about the standards that you, as an organisation, decide you must have.

The test for Box 1 is what you do if trainees do not reach the required standard. If the answer is that you just let them carry on in their job regardless then, by your own admission, they did not have to have these skills – in which case you try to put it into Box 2.

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Box 2: 'Added value'

Box 2 training is entirely different to Box 1. Box 1 keeps the organisation's head above water. It helps you to avoid risk and potential litigation. It also ensures customers speak to employees who know what they are talking about. But it does not move the organisation forward.

Box 2 is called 'added value' because this sort of learning *improves* the way the organisation operates. All of the examples shown in Box 2 in Figure 1 will reduce costs, increase revenue, or improve the >

► quality of your products or service. However, to put this training in Box 2 someone has to ask the question 'How much is it worth, in real £s?' If the problem-solving programme solves problems, what will that be worth?

If you cannot be bothered or do not know how to answer this question (you may have to wait until Part 5), then this training has to slip into Box 3.

Box 3: 'Nice to have'

Box 3 is reserved for any training that is not 'must have' and where no one knows its potential value in £s. In other words, no one is ever going to take it that seriously. It could also be called the 'take-it-or-leave-it' box. Take the example of team building. To put team building into Box 1 would require an assessment of the team's performance. In addition, managers who could not build effective teams would no longer be managers. To put it into Box 2 someone would have to describe what an effective team could achieve, in £s. While it sits in Box 3 it is more likely to be regarded as a 'fun' event with some very indistinct aims (for example, improve team cohesion?).



Learning should not be viewed as some intellectual, ivory tower exercise; it should be about **finding practical solutions**

The whole point of the three-box system is to have a dialogue with managers and trainees using a common language. Everyone involved in the learning activity must agree which type of training it is and accept the consequences. If the manager and the trainee accept that product knowledge is in Box 1, they also have to accept a test to check that the desired standard has been reached. Their agreement to this is a clear sign of their level of personal commitment. In the same way, if they are happy for it to fall into Box 3 they are clearly signalling very little, if any, commitment.

The three box system is a simple way to establish and reinforce the right attitudes to learning. In Part 4 of this series, we will look at building a training and learning cycle that links all learning directly to the business. •

Action points on developing the right attitude

- Write down at least three principles you would like all learning activity to adhere to. Ask one of your training colleagues and a senior line manager to do the same. Can you now produce and agree a basic set of principles for future use in learning discussions?
- Briefly explain the three box system to a line manager and ask him/her to categorise any training recommendations made over the last 12 months into the appropriate boxes. What does it tell you about the line manager's commitment?
- Establish at least one training programme that sits clearly in Box 1. Ensure a minimum standard of knowledge and skills is agreed with a key business sponsor and include some assessment as a key part of the programme.

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How learning consultants bring maturity to the organisation
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How learning consultants think and act strategically
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