



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

Part 8: How learning consultants become creative designers

There has been a very strong and continuous thread running through this series of the need to link all learning to clear business objectives. This implies focusing on hard business measurables at all times, and might give some trainers and organisation development specialists the impression that the role of the learning consultant (LC) ends up being very narrowly focused and one-dimensional. In order to allay this misapprehension, I hope to demonstrate in this article that the role of an LC is dynamic and multi-dimensional, and provides ample opportunity for those who want to give full vent to any creative urges. I would even go so far as to say that creative design is probably one of the key skills for an LC. The constant need to make the learning experience new, fresh, exciting and rewarding requires originality and innovation in design.

That said, the words 'training design' do seem to mean a lot of different things to different people. The same term is used to cover a very wide spectrum of activities from simply choosing the training

method and materials, through instructional design right up to sophisticated designs that try to cater for a range of learning styles. There is plenty of literature on these aspects of design (including David Cotton's series alongside this in *Training Journal*), so we are not going to rake over any well-trodden ground here.

Instead we will concentrate on the practicalities of designing learning so that it becomes totally integrated with both the strategic and operational management of the organisation. Design is an integral and distinct phase (Phase 3) in our learning cycle (covered in Part 4). Poor design, therefore, as with any other phase of the learning cycle, will ultimately result in learning failure.

The best learning designers view their task from a very wide angle and ensure that the learning matches the context. For example, they would see project management as an organisation-wide issue, not just something for those involved in running projects. They would want to ensure that everyone involved in the project management process is involved. They would also design project management training around some existing projects so that the learning is 'live', relevant and sharply focused.

However, our learning cycle emphasises an extra phase of 'reinforcement' (Phase 6). So LCs have to design in as many ways as possible for learners to be encouraged and supported by their managers. Will they be given an opportunity to lead the project team and run meetings? Reinforcement cannot be left to chance because it would be unlikely to happen at all. So good designers have to view learning from the perspective of each and every stakeholder. They may well design an intervention that requires much more active involvement from line and senior managers than has traditionally happened in a less mature organisation. So where and when can they start to build this into the design?

Paul Kearns

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WHICH ROUTE: SKILLS/KNOWLEDGE OR BUSINESS GAP?

Let us quickly revisit the classic training cycle (training needs analysis (TNA), design, delivery and evaluation) from a slightly different angle. This is now shown as four steps in the middle of Figure 1 (see page 52) with the design phase shown as the second step, only after a proper TNA has been undertaken. However, the steps shown running down either side illustrate that there are basically two types of training and development, requiring two very different starting points.

A significant proportion of all training and development aims to fill a gap in knowledge or skills (left-hand route) – either for new employees, who cannot be expected to be fully competent when they start, or for existing employees, who have to catch up with changes in legislation, systems, products or other matters that affect their work.

In the left hand column in Figure 1, a need for spreadsheet training is shown as an example of some very basic knowledge-based training. Usually any training along the skills and knowledge route is Box 1 training (see Part 3 of this series on the three box system), because the organisation decides it has to have it. The TNA would identify who needs to have these skills and who already has them. For those who need the training the designer has several options such as a tutor-led course, a book or online module. After delivery, the ability of the trainee is validated (Levels 2/3 on the evaluation model covered in Part 5) by asking them to produce a spreadsheet to a given specification (for example, 'Produce a spreadsheet to calculate weekly expenses and include a graph of accumulated expenses').

The left-hand route is often quite straightforward from a design perspective when we are dealing with simple, basic skills and

knowledge and any conventional, professional training designer will already be very competent at this. What an LC needs to concentrate on, though, is the right-hand route.

Here the starting point is also a 'gap', but this time it is a *measurable, business* gap. This usually falls into Box 2 because resolving this gap will add value, in pounds. That means that the business (through the LC) has already identified an area in which the business needs to perform better. This could be in terms of reducing costs, increasing revenue or improving quality. In this example there is a significant rework problem with 10 per cent extra cost being incurred. This

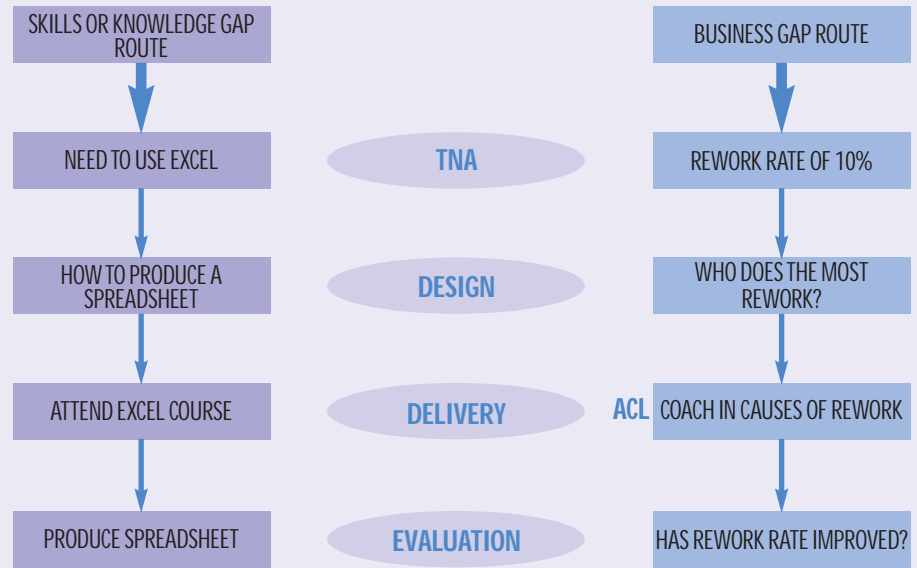


Budding LCs have to recognise that there are **several key differences** between the skills and performance gap routes

could be described as the 'performance route', because if the training works there will be a very observable and tangible improvement, with a pound-sign benefit (lower labour costs), whereas in the spreadsheet training example earlier, if someone could not produce a spreadsheet it might not have such a discernible effect on his or her performance because s/he could always manually calculate expenses and even draw a chart. Business gaps, however, will always show up in financial, management reports.

Budding LCs also have to recognise that there are several other key differences between the skills and performance gap routes. ➤

Figure 1: One training model; two types of training



Difference 1

The business gap problem has been clearly measured in advance and has to be 'owned' by any manager who is influencing the rework problem. This could include the purchasing manager as much as the production manager if one of the root causes of the problem is the purchasing of sub-standard raw materials. It might even include the goods inwards manager who has failed to check the quality of supplies. Designers need to know who they are dealing with and the causes of the problem before they can design a solution. This problem might have nothing to do with production line operators.

Difference 2

Identifying the stakeholders hooks them into the learning process because they have a vested interest in making the training work. The poor rework figures are already showing up every month in their figures. This is what motivates them to take



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an active interest and reinforce any learning that is taking place. They will be instrumental in the whole process. Designers might even have some comments to make on how the company reports on such matters, especially if they point the finger at the wrong people.

Difference 3

During the TNA, the managers with the worse rework/performance scores (see Part 6) would have been highlighted and the designer would be able to see exactly who was having to do the most rework. Whatever s/he designs will therefore be well targeted and aiming to get the best return.

Difference 4

The most interesting aspect has to be the choice of delivery method for any learning solution. In Figure 1 there is an emphasis put on ACL (action-centred learning), so the designer asks the best manager, with the least rework problems, to coach the underperformers. Of course, s/he has to design in the necessary time to allow them to do this effectively and ensure such people have the requisite coaching skills. However, the designer might even design a root cause analysis programme to be run at the beginning of each shift for everyone involved (for those who remember working with 'quality circles', this is what they were intended to do).

Difference 5

You might also notice that following the business gap route usually results in a relatively easy evaluation, simply by re-measuring rework rates at a pre-agreed later stage. Of course, very few organisational problems are one-dimensional; a whole range of variables could have an impact (for example, old equipment, changing working practices, new suppliers of raw materials, and so on). However, the designer will already be working to the principles of PDCA (Plan, Do, Check, Act; see Part 2) and have set up an iterative process whereby each separate cause of rework problems will eventually be addressed. This could even result in a change in an operational process (for example, raw materials are only delivered to the line on a just-in-time basis to minimise any chance of accidental damage).

CASE STUDY: It's a leadership programme, Jim, but not as we know it!

A head of learning and development in a large financial services business asked me if I had any new ideas on how to design a really good leadership programme. His CEO had told him their own scheme had been running, unchanged, for too long and that there was a general feeling that it was a bit tired and dated. I suggested that the real reason behind the CEO's comments must be that he was not convinced the leadership programme was getting the results he wanted. If it was, he would not be looking to change it. Managers don't change winning teams.

I advised the head of learning that most leadership programmes were designed along the same lines so, rather than try to put old wine into new bottles, he should have a complete rethink about the whole subject of leadership and design a completely new approach.

First, I asked him to consider the left-hand route of skills and knowledge. What skills did an effective leader require? He replied that good leaders seemed to be able to inspire their people to get the best out of them. I replied that the ability to inspire was a talent, not a skill. If he wanted inspirational people he would need to build that into the selection process, not the development process.

Undaunted, he suggested they needed to be great communicators. If they could not communicate their ideas, how could they lead? I felt this was something we could focus on. However, to follow this as a skill requirement (down the left-hand route) we would have to assess each participant's ability to communicate and only work with those needing help. This same principle was to be followed for any other 'leadership skills' he cared to identify.

Meanwhile (down the right-hand route), I suggested he should be linking individual leadership ability to their own, current performance levels and only designing interventions according to specific, business needs. So, for example, if new product innovations were not satisfactory this should be measured (for example, number of new products to market, development cycle time, ideas generated by staff and implemented), and the senior managers concerned should be challenged about their ability to lead a team on innovation. Once that was established there could be an infinite number of learning solutions, but all with a direct focus on business performance. The link should not be lost at any time.

After much further debate he could see that what I was suggesting was, indeed, a leadership development programme but it would look nothing like the management school events he had been running in the past.

WHICH ROUTE FOR MANAGEMENT DEVELOPMENT?

Any leadership or management development specialists reading this might be wondering where his or her portfolio of management programmes comes into this training model. What about outdoor management development, leadership programmes or even basic management modules (for example, planning and organisational skills)? How do they fit into this very simple two-route system? The answer is it depends on what such programmes are meant to achieve.

Let us consider the many outdoor management specialists offering programmes that purport to develop all sorts of skills, behaviours and team building. When you stop and consider this from a designer's perspective it should strike you as odd that such providers have already designed a programme for managers whom they have never met. This goes against the LC's principles of tailoring and individually centred development. In effect, there is a basic assumption that no real individual learning analysis is required because the providers believe the programmes will be applicable to any manager. Such programmes break all the rules of training and development design.

Imagine you have an engineering manager who has great technical expertise and a wealth of experience but is obviously deficient in the range of skills required to run a team or instil a certain amount of *esprit de corps* among his/her staff. This manager might sound like just the sort of character who could do with going on an outdoor team building weekend. However, if that is the way you normally send managers on such programmes you are in danger of completely missing out the TNA and design phases, and moving straight onto delivery. LCs would never do this without first running the basic idea through the routes shown in Figure 1.



The prevailing view in management development appears to be that if we **deconstruct what makes an effective leader or manager** we can develop others using this template

Think for a minute or two about what skills or knowledge (or even competence if you prefer) this particular manager is lacking. That is quite difficult, isn't it? How do you pin down specific skills in such an area of complex and apparently intangible soft issues (an area we covered in Part 7)? Well, maybe you don't. Maybe you should try the business gap route? What evidence do you have that this manager, or his/her team, is underperforming? What business gap have you identified? If there are no business gaps, how can you justify your opinion that this manager is deficient in any way? Possibly the business gap is a higher staff turnover than in other teams where the managers could be seen as more emotionally intelligent?

Even if you trust your judgement and experience, and still send this manager on this programme, Step 4 of this classic model tells you that you have to evaluate his or her outdoor development programme at some stage to ensure that learning has taken place and the right result is achieved. The only problem is, you would have nothing to evaluate against if you have not collected any baseline measures. No, there is no way an effective LC can avoid the solid discipline of using a robust training model. Ignoring it is just an admission that the organisation is working at a lower level of maturity. You would then have to admit that you were prepared to spend scarce resources, dealing with the ill-defined personal issues ►

► of some managers, by supporting development programmes that have no clear objectives.

So what is the answer? Maybe we need to re-visit some of the conventional wisdom that currently surrounds management and organisational development.

DESIGN PRINCIPLES: DECONSTRUCTION VS. RESULTS

The prevailing view in management development appears to be, in very simple terms, that if we deconstruct what makes an effective leader or manager we can develop others using this template. Hence we see competence frameworks with a whole host of 'competencies' that are deemed to be necessary for managers to achieve competence. This is a very personal view, but I regard this whole approach as much too simplistic and indicative of an immature organisation for two main reasons.

Reason 1

Once a *generic* set of skills/competencies is produced, any direct link to specific business measurables disappears. This immediately reduces the potential impact of the learning. It also lowers levels of ownership and accountability and they, in turn, undermine the learning experience for everyone involved.

Having now introduced a **fresh perspective on design** we are bound to see a difference in the way training and development is delivered



Reason 2

Successful leaders and managers are not a perfectly homogeneous group and some are very successful in spite of (or possibly because of) their ability to get results without necessarily demonstrating some of the softer skills that we would all wish to see them exhibiting.

All designers will have to decide which school of thought they enrol in.

- Do they subscribe to the notion that we can usefully deconstruct and reconstruct management capabilities?
- Or do they regard each person as a completely unique individual to be developed, according to their own strengths and preferences, within an overall framework that says the only ultimate gauge of success is business performance?

Ironically, the biggest demand for evaluation often comes from those who lose the link to the business because they now have to convince senior managers that this apparently 'intangible' world of management development actually produces results. However, results-focused LCs (following the right-hand, performance gap route) will already have sorted out the evaluation criteria before they start development. They will have agreed the measures to be used for evaluation, in advance, with both the participants themselves (the trainees) and any senior managers or other stakeholders involved. This then means they can answer their own questions about the effectiveness and value of the development activity at a later date.

Action points on how learning consultants can become creative designers

- Have a fresh look at the role of the training/development/learning designers in your training team. Ask them where they see their role starting and ending in the complete learning cycle. If they do not want to get involved in designing in evaluative links to the business, then someone else has to do this task.
- Reconsider any programmes you currently run that were based on assumed, generic learning needs rather than a proper, individual learning needs analysis.
- Revisit any training and development programme that doesn't seem to follow either the left- or right-hand routes of the training model shown. Ask yourself whether the skills and knowledge have been clearly identified. If not, consider what business gap you are trying to fill. Failing that, consign it to Box 3.

So, here is a summary of the LC's approach to design.

- Well-designed training rarely needs evaluating.
- The best designed training already has evaluation built in.
- Badly designed training will be exposed by any subsequent evaluation.
- Poorly designed training is a waste of everybody's time and money.

Having now introduced a fresh perspective on design we are bound to see a difference in the way training and development is delivered – the next phase of the learning cycle – and one that we will cover in Part 9 of this series. 📖

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