Stand Firm in Quest for True Data

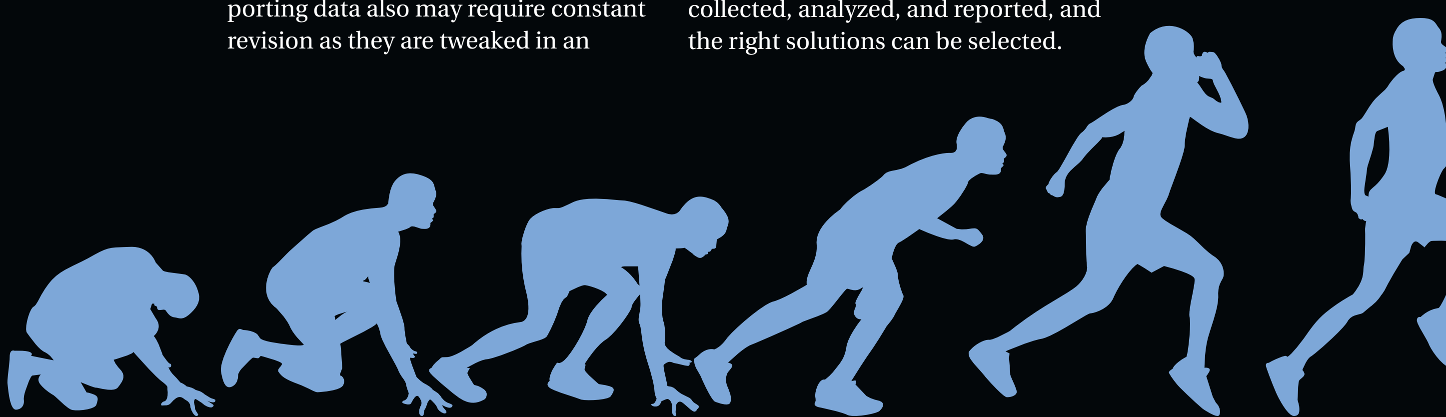
By Tom LaBonte and Molly Necessary

Performance improvement analysts can overcome their clients' objections with the help of a few practical tips.

Faced with competing demands and increasing expectations, clients and business partners often want to skip the analysis phases of the performance improvement process and go straight to determining solutions. However, when business, performance, and cause analyses are eliminated, the organization's real problem is not uncovered, and the barriers to achieving success are not identified. Time, money, and other valuable resources are wasted on correcting symptoms instead of dealing with the root causes of the problem.

Solutions identified without supporting data also may require constant revision as they are tweaked in an attempt to make them work. The cost in terms of lost opportunity and team member frustration is often incalculable, but it certainly hinders performance. Without proper analysis, the client cannot successfully attack its performance gaps, and trainers and internal consultants are doomed to become reactive order takers.

One of the ways a workplace learning and performance professional can contribute value is by producing data that supports sound business decisions. The challenge is to overcome client objections to performance improvement analysis so that data can be collected, analyzed, and reported, and the right solutions can be selected.



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This article provides tips to help you overcome client objections and conduct meaningful analysis, and to help your client solve business problems in a collaborative, effective, and efficient manner.

Before collecting data

Consider the following scenario. Your phone rings at 7:35 a.m., just after your first sip of coffee to start the day. "This is Bill at the Southwest Regional Office," the caller says. "I need your help with training to motivate my team so we can meet our fourth quarter goals. How soon can you get started?" You request a meeting to discuss the next steps.

At the meeting Bill immediately presses you to set an early start date for the training so he can get "quick results." You ask Bill about existing documentation and data on performance goals, gaps, and the root causes of the gaps. As you begin to talk about the possibility of causes and solutions other than training, Bill interrupts you. "Look, we don't need data," he says. "I know the business and I know what I need. So let's stop wasting time and plan the training I requested." This is one of the many common client objections that you may face in your work.

Client objection number 1: What you're proposing will take too long. When faced with this objection, you should say, "We will avoid the pain and expense of rework and duplication of effort" or use the language of business so the client understands the deliverables and outcomes of value that outweigh the time and expense objections.

Client objection number 2: I already know the solution. Why can't you just give me what I want? To answer that response, you should be prepared to say, "My obligation to you is to provide performance support that minimizes expenses while maximizing opportunities for results. To do that, we need to concentrate on complete solutions based on data. The training you are requesting may be part of a bigger solution needed for results but we won't know that without first collecting root cause data."

Or another response might be: "You indicated in the initial meeting that the gaps were very painful and must be addressed. Just as a physician never prescribes a treatment without diagnostic testing, we need to gather data so that our solutions truly cure the pain instead of being a Band-Aid."

Your last resort would be to ask whether the client is willing to accept the risk that without data you will plan, design, develop, and implement solutions that incur expense without affecting the gaps.

Client objection number 3: You're not an expert in my business. How can you help me? One response might be: "My expertise is in identifying, analyz-

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ing, and reporting data that supports your achievement of business results. Not being a subject matter or business expert is actually an advantage because I can be objective and gather the appropriate data."

You also could say, "I conduct comprehensive interviews and observations with some of your star performers and subject matter experts, analyze internal and external data and trends, and report the data to you" or "I gather data from at least three sources using a variety of tools to minimize biases and produce valid, reliable data for effective business decisions. My focus and value is as a business partner who objectively produces value for your success."

During data collection

At the end of the first week, you get a call from Bill to meet with him for a status report. When you indicate you don't have much data yet, Bill insists on an update. He opens the meeting with several rapid-fire questions: "What is the data telling you? Are there any indicators or trends that we can act upon? How much longer do I have to wait before we can move forward?"

Client objection number 4: I'd like some data now. I'd like to sit in on some of your interviews. One reply to this request might be: "Objectivity and confidentiality are essential to the success of the analysis and to obtaining accurate data on the business problem. Team members will not give full or objective answers if any member of management is present."

You also could counter with: "Confidentiality is essential to success in encouraging team members to willingly provide data on causes and solutions to the gaps. If anyone other than the analysis team meets with or has access to the sources of the data, the consultant's credibility is compromised."

Another response might be to tell the client that the interview would probably not reflect the findings as a whole. Remind him that it's important not to jump to conclusions and that findings and recommendations must be based on a thorough trend analysis after all the data is collected and analyzed.

Client objection number 5: It has been two weeks since you started collecting data. Let's use what you have and start getting results now. This is a common client response, but you must stand your ground and say, "Consultants need reliable data from three sources using three tools with enough of a sample to identify the root causes and solutions that will work the first time. If we move forward with what we have, then you may not get complete, valid, and reliable data and the findings on causes and solutions will not be effective. In the future, we will be forced to come back and deal with these same issues."

Client objection number 6: I know you're not finished with your analysis yet, but can I see what you have so far? You need to remind the client that weekly progress reports will be made available. Do not report findings until all of the data is collected, checked for validity and reliability, and analyzed to determine completeness. Reporting interim data places you at risk because it may mislead you on the real causes of the gaps.

If that doesn't work, you could try saying, "It is in your best interest to follow the agreement made during initial meetings that findings and recommendations cannot be made until all of the data is collected and analyzed. You will have a complete picture of the data and be better able to make informed decisions when the complete set of data is reviewed."

At the data report meeting

You are presenting the data to Bill on the barriers and root causes of the performance gaps. He is looking intently at the data on the leadership barriers of the management team that are affecting results. His face becomes flushed. Bill takes a deep breath and directly challenges the "truth" of the data.

Client objection number 7: How many people did you collect data from? That's not enough. Your comeback to this objection should be: "We gathered the right data from the right people using an appropriate representative sample and a statistically valid sample size. Please tell me more about your thoughts on why you believe the sample size is not large enough."

You also could say, "We gathered and analyzed data from a representative sample of all levels of performers to give you a complete picture of barriers and solutions for results. Trends from data reports from our internal financial analysis and market research support the trends we reported in the data."

Another response might be: "The external benchmarking data aligns with and supports the trends in the internal data we collected and reported. Are there other issues beside sample size that concern you?"

Client objection number 8: We need more data. Let's wait and deal with this later. One response to this might be: "I remember you telling me at the initial meetings that the gaps were so painful that change was needed and you wanted help to get results. How will delaying action help you get the results you need?"

You also might say, "We have gathered the data you requested and approved in our work agreement. The data indicates several opportunities for immediate action that will improve results. Let's focus on those action items to move the process forward."

If all else fails, tell the client that a thorough analysis of barriers that

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are causing a lack of results is contained in the report, and that the report includes all the data he needs to make decisions on the next steps. Assure him that you will stick with him through the remaining steps of the process so that the team selected to build and implement the solutions will understand the data.

Value-added service

The basis for your success in overcoming client objections is the degree to which you are considered a valued, trusted partner by the client. Partnering involves a long-term business relationship built on the value you bring to the table and your commitment to the client's success. It is essential that you add value at every client meeting, telephone call, and email and deliver excellence in service to establish credibility and trust with your client.

As many organizations must operate with limited resources and competing demands, clients are often in a rush to take action to solve problems. The painful consequences for you and the client are often that the same business issue must be attacked multiple times. Solving the problem the first time is a valuable service that performance analysis can provide.

Your analysis strategies should never deviate from your ultimate goal—to provide reliable, quality data that help your client make sound business decisions and that support improved business results. **T+D**

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Ten Tips for Success as a Performance Improvement Analyst

1 Remain a true strategic partner before, during, and after data analysis. Make sure you don't take over the ownership of the business problem from the client. Your role as a strategic business partner is to provide reliable data to help your client make sound business decisions needed to achieve business goals.

2 Know and build upon your strengths and develop new competencies. Most of the methodology and process knowledge competencies can be obtained through education and on-the-job application. You must demonstrate strategic thinking, visionary thinking, and the ability to systemically "peel the onion" to clearly identify the real problem.

3 Work as part of a team with performance partners in human resources including organizational development and with Six Sigma experts. Be sure to include a star performer and subject matter expert from the client's business unit to help you interpret the data and gain client buy-in and trust.

4 Gather as much internal and external information as you can on the performance gaps. Prepare a gaps table for the client to show the target of addressing the gaps and achieving desired goals.

5 Ask thorough questions that are pretested to obtain objective and reliable data. Be sure to ask enough open-ended and probing questions to uncover the root causes and potential solutions for each cause.

6 Stay true to your findings based on the data. Precision in data collection and analysis will lead to the appropriate recommendations. Don't identify a cause or solution unless it is supported by your data. Avoid presenting your personal opinions and preferences.

7 Have confidence in the methodology and your findings. This will be apparent in your meetings and presentations with clients.

8 Use a concise easy-to-follow format for your findings report. Prepare an executive summary that includes a review of the methodology, key data findings, and recommendations. Include wording from the client's agreement if possible. Prepare a binder with detailed data that will help you answer client questions.

9 Don't provide your findings report to your client in advance. Seize the opportunity to present your information in person. The passion and additional information you'll add in this face-to-face meeting will increase understanding and buy-in. It also decreases the chances of your data being misinterpreted and implemented incorrectly.

10 Be intentional about how you manage client expectations prior to presenting your data report. Start the presentation by reminding the client about your analytical rigor and objectivity to eliminate objections to the data during the meeting and to increase client support.

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