

What Do Contract Trainers Need to Know to Be Successful?

When you're on your own, have a number of clients, and work across industry lines, you had better know what you're doing!

Contract trainers are a special breed of human resource professional. They come into a company; perform a service, often for quite extended periods; and leave, sometimes to return at another time and work with another group. Such arrangements are ideal for the client organization that doesn't have enough money to hire another full-time person but needs a human resource or training problem solved pronto.

Contractual arrangements require a lot of the human resource professional involved. This individual must learn the ins and outs of each new company, needs to have an understanding of the industry in which clients are based, and never knows which human resource skills he or she will be called on to use in each new situation.

But while the contract training field is very demanding, it is also supremely rewarding. Contract trainers choose their own assignments, are no longer embroiled in day-to-day bureaucratic nonsense, make their own hours, and often have greater professional development opportunities than their in-house colleagues.

Of course in order to reap the rewards of contract training, one must be successful at it. What follows are some helpful hints from those who should know what

makes a contract trainer good. Three of this month's "Four by Four" contributors are or have been contract trainers, and two of them are or have been responsible for purchasing the services of contractors.

Whether you're designing a program, doing OD work, or performing a stand-up training function, you must understand how each organization thinks, what its culture is, and what its values are.

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Many organizations today are smaller in staff—particularly in training staff—and they are finding the need more and more to go outside and find trainers who can help them with specific problems.

Increasingly, the people who go into contract work are not the new kids out of school; they're the seasoned athletes, the

folks who have been around. These people have experience in all areas of the human resource function—analysis, implementation, program management, design, administration, and stand-up training. They generally come out of organizations wanting to do more and have more freedom than they did as in-house trainers.

These individuals also like to meet a lot of different people and be in different situations. They find challenge and satisfaction in going in and quickly learning a new organization and helping solve problems.

The recommendations

1. Find an area of expertise that you really are skilled in and that you like. Chances are that you will be able to find a niche in the marketplace. You'll also probably be much better off if you're more specialized in one or two industries. You can't be all things to all people. If you go into an organization and say that you can do anything well, the potential client's reaction will most likely be "If you can do anything, don't do it here. I'm looking for someone with a specific skill."
2. Whether you're designing a program, doing OD work, or performing a stand-up training function, you must understand how each organization thinks, what its culture is, and what its values are. Contract trainers need to know the right questions to ask and the right people do direct those questions to in order to obtain the right information.
3. Teambuilding skills are also critical because you're going to be sort of an extended family; you have to be able to fit into each new team without dominating it. You have to learn when it is appropriate to give feedback and how to give it. You must be in tune to what is going on; very often you will be able to hear or see things that full-time members of the organization can't.
4. Always remember who you work for. If human resources hired you, that's where your check will be coming from.

When you get very involved in your work out on the line, it is easy to forget who your client really is. If you've been there for a while, you can start to feel like you are a full-time employee. I have seen cases when contractors begin taking all their direction from the line and contract for additional work that has not been authorized by the client.

Remember that you're providing a service to the company. This means that you have to keep coming back to whoever hired you, asking them whether you are still on target, telling them what you're doing, and asking whether you should continue.

5. You must continue developing your professional skills. You should put a tremendous amount of emphasis on development activities such as attending workshops, joining professional associations, and going to conferences and conventions. Doing such things will help you keep up with what is going on in your field.

6. In addition to attending your own profession's development activities, you should become more involved with the industries that you usually work in. For example, if you have a lot of clients in health care, attend medical conventions. Being visible is important; remember that other people at these activities are in a position to hire you.

Another good way to learn about the industries in which you commonly work is to attend pertinent classes at community colleges. These institutions are priced reasonably, so somebody who is self-supporting can afford them.

7. You need to be concerned about the nature and scope of each of your clients. For example, small businesses often are run by entrepreneurs, so you must understand who each entrepreneur is and what he or she is looking for. When you go into an organization you have to understand what it is about and how it got to where it is now.

This means you have to be a good listener and a keen observer. And don't just observe how people do their work, but notice how they look, how the facility is structured, what kind of desks people sit at, what's going on around the coffee machine. These are things that you need to pay attention to if your ideas are going to fit.

If you don't set personal goals or standards for your performance, you put yourself in danger of losing your enthusiasm—you start just grinding it out.

Jerald Tomas is president of Tomaco Inc., consultants, in New York City.

Contract trainers don't have the in-house trainer's luxury of being at the company or within the industry constantly. What differentiates *outstanding* contract instructors from *average* ones is that the former realize that they need to know more about the business world and more about the products and services the client offers and how it offers them. They also recognize the necessity of knowing something about the client's social system.

Contract instructors who are outstanding have skills in many areas—establishing credibility, building positive relationships, assisting the client in maintaining focus—in addition to superior delivery skills. The best instructors also understand the difference between providing a service and delivering a session. They endeavor to know more about the client than average trainers do.

The recommendations

1. Think of what you do as providing a service that assists people in doing something. This attitude implies that you are there to serve the needs of the client organization and to share your expertise. Average instructors only talk about what they do in the classroom and think in terms of units of time.
2. Endeavor to get information over and above the biographical data of the people you will be instructing; find out why the client organization wants to run a certain program. Spend a lot of time interviewing to get information about the client's hopes and fears for the process. What do they really want to have happen?

To be outstanding, you must have a wide base of knowledge about the company, the industry, and the purpose for the program. The skilled contract instructor understands that there is much more to the process than simply what they do in the classroom: you must understand the organization and the culture. All organizations have certain characteristics that differentiate them from others. You must begin at the early stages of the process to understand the unique business conditions and environment of the client.

Knowing the business that your client is in is more than simply reading annual reports to learn the business; it means understanding the business, the industry, the nature of the competitive environment, the client's products and services, the history of the firm, and the history of

training within that firm.

3. You also have to know and understand the hopes and fears of the participants. There are many reasons people go to training programs. If you don't delve below the surface of that, the training program may run nicely and you may get a good report card, but you won't quite be sure how well you served the client. You must establish key relationships with people, letting them know that you're there for them and that you understand that everyone comes with their own attitudes, requirements, and anxieties.

To be an outstanding instructor, you must do certain things to enhance your credibility in front of the participants, not just in the classroom but in the context of your entire relationship with them. From the very beginning, participants have a myriad of questions—most of which aren't asked—that deal with your power, competence, reliability, energy, and commitment. The participants are more likely to respond to you if you actively solicit and accept questions, demonstrate an ability and willingness to listen, help participants to build upon each other's ideas, use language and examples appropriate to the participants' backgrounds, and demonstrate preparation and organization specific to that group.

The challenge is to establish credibility without being overbearing. If you recite what you've done before, the audience is likely to respond to you as being pompous; you'll only separate yourself from them rather than integrate with them.

4. Insofar as classroom skills are concerned, only novice instructors believe that it's the content that is important and forget about what they are doing in the classroom from the very beginning to establish credibility.

There are three key issues that interlock, the first being content. Of course, you need to be skilled in the information you're trying to translate and the instructional methodology that you will use. The second key element is that you must be able to manage the information and methodology in a room of participants.

And the third element is that you should be conscious of the value you are adding. You see, if all you had to impart was information, I'd suggest that you write a book because the most economical way to dispense information is through a book, a videotape, or a film. But because you are in the classroom with anywhere from four to 20 people, more has to take place than

simply sharing information.

Adding value also has to do with providing what I call mental hooks: What are you going to give participants in terms of materials to work with? Are these materials of sufficient value? Will people keep those materials and use them after the session? This all deals with utility, which means that you have to have a very good understanding of how people are going to encounter the information or the skills and how they're going to try to use them.

To be an outstanding instructor, you should have definite goals in mind for each session that you conduct. You should have goals concerning how you want participants to feel about their educational experience, what you want participants to know or gain in terms of skills, and what you want people to do with their new skills and knowledge.

5. Because as a contract instructor you probably will be going from organization to organization and industry to industry, you don't have an in-house trainer's luxury of learning over time the different styles of the organization, the different needs of the people, the preferred way of doing things. So you need to establish a method for yourself of knowing which questions to ask that will help you quickly identify differences in each organization. This will help you plan your training strategy.

6. To be an outstanding contract trainer, you must establish personal goals and standards. There are so many things to manage in an instructional capacity that it's not possible to do every one perfectly. The best you can do is attempt to do most of those things well most of the time. Going into any new situation, look backwards a little bit and try to extract the things in the past you have done particularly well and some things that need improvement. Engineer those considerations into your next session.

The bottom line is that regardless of the skills you have, just knowing what to do isn't going to do the job. It's only in setting your own goals that you'll use what you know. Set goals for using each skill and perfect each one. If you don't set personal goals or standards for your performance, you put yourself in danger of losing your enthusiasm—you start just grinding it out. The challenge disappears from your work and you'll be apt to overuse certain skills and let others atrophy. And since you never know in advance exactly which skills you'll need, you have to be primed on all of them all the time.

7. Make sure that your fee schedule allows for changes in client requirements. Endeavor to meet the client's needs within a certain budget, but have a standard to measure your services against. If you're out of touch with your standard, you'll lose sight of the fact that you're in business, and that will ultimately have a consequence concerning how you feel about what you do.

If they wear blue jeans and work 7 to 3, you should wear blue jeans and work 7 to 3.

Phil Edwards is senior partner of We Partners in Houston.

I think we're going to see a lot more contract trainers, especially due to the large number of people retiring early in recent years. The people retiring often make excellent contract trainers because they have spent many years in management and can see things from the other side of the fence.

The recommendations

1. You have to do your homework. Finding clients is not much different than looking for a job. If a prospective client asks you what you know about the company or the industry and you say you know nothing, it sounds like you're telling them "Give me some money and I'll learn." It works much better if you can show them some general knowledge.

Study all the public information about the company before your first meeting. This includes financial information and articles in newspapers and magazines. If the client has stores or dealers, shop their products and services. Get product catalogs, copies of the company newspapers, and organizational charts. Use industrial dictionaries and review any generic training available so you understand the industry's vocabulary. And ask for tours; you can start learning the organization's personality from that.

2. If at all possible, have the company provide a contact person or host for your activities and have this person inform participants of your assignment and ask for

their cooperation. If you go in blind and just show up, you have to spend time explaining why you're there.

Keep your mouth shut and be a good listener most of the time. Don't start off the initial contact by asking someone to fill out a questionnaire or by telling them how wonderful you are. You really have to swallow your ego.

Be flexible; often you have to work around the participants' availability, not your own. They have to do their jobs while you're working with them. It's pretty rare for organizations to take their employees off their assignments to work with you. I have also found that unless I'm working on the shop floor areas, most people have to get their day started before they're ready for you.

3. Start at the top of the organization to get the big picture and identify future requirements; work down to the trenches. Work with senior management first concerning where the problems are now and what they expect in the future. Managers can be very helpful in telling you what they're looking for in two years, in five years, and so on.

Respect the management structure and never bypass a manager's authority. Never go directly into a manager's area without his or her acknowledgement and approval. One of the worst things you can do is go in and start talking to people when their boss doesn't know why you're there. So I always tell the supervisor why I'm there and ask him or her to introduce me to the employees.

While managers can be helpful in telling you what they think the current problems are or where they need training, often they're somewhat out of touch with the reality of the world. So the people doing the job can be a tremendous resource. Don't hesitate to go down on the shop floor and spend time with those people. If they work shifts, work a day, an evening, and a night shift with them. If they wear blue jeans and work 7 to 3, you should wear blue jeans and work 7 to 3.

Act professionally at all levels. If you're going into a factory, dress like the workers do. Three-piece suits and Rolex watches on the shop floor keep people there from considering you a team member.

4. Write down the names, titles, and background information of everyone you're contacting. Having a contact file that includes discussion topics, personal information, and interests can be very helpful on your next visit. When

somebody starts talking to you, it's good to have something that you can identify with that person. If someone just had a baby, got back from a trip, or got a promotion, make a note of that and then refer to it when you next speak to that person. It's a great icebreaker.

Never use recording devices during interviews without an employee's permission. Some people are very skittish about recording, although it is an effective tool for notes. Always mention the recorder and tell the person what you're going to do with the tapes. Assure interviewees that conversations are confidential. Unfortunately, because tape recordings have been used as axes in the past, some people still will not consent to being recorded.

5. Writing thank you cards or notes to individuals as well as to the management is a nice touch. I often write a note to management mentioning people who were very helpful, complimenting them on their team, or something like that. If I'm working in the field and I'm taking pictures for method studies, often I shoot some "people pictures" and make two copies of them. I'll sign one on the back and express thanks and give it to the individual. I usually put the other copy on the office bulletin board or in the company newspaper.

6. Find a mentor who is objective about the company's history, the formal structure, and the informal decision making. This is usually an older person in management who has been in all kinds of positions. He or she can give you the history of the people you're working with, the development of the area, things to watch for where they've had problems—all of the kinds of things that usually take you a long time to find out on your own.

7. You really need to wear several professional hats when working with customers. Hat 1 is the hat of the HRD professional viewing everything through the eyes of a professional trainer. Hat 2 belongs to the new employee assigned to the work area. Hat 3 is that of the manager or specialist, looking at the situation objectively. And Hat 4 is that of the public, customer, government, or media person. I've found that this four-fold approach allows me to see objectives clearer and leads to management accepting the study and recommendations easier.

8. If you're working where there is an in-house training group, always stress to them that you're there to help, not to replace them. A lot of trainers get very skittish when another trainer comes into the group

from outside. Invite them to work with you if appropriate. They can be a tremendous resource for you, and it can be a lot of fun working with them.

I don't care what industry or business most of your clients are in, you have to come across as an intelligent, lively, sophisticated person in order to be a successful contract trainer.

George Fahlgren is first vice president and manager, client services, for Omega Performance Corporation in New York City.

One of my concerns about contract training is that many industries and trainers do not recognize what makes a great contract trainer. It takes more than having some experience leading a workshop, taking a public speaking course, or being recognized as a good entertainer. It's a highly professional area in which people have to be very well trained to be good. But there are many less competent people who hang out their shingles and make themselves out to be contract trainers. Hence it's very difficult for industries that would like to use contract trainers to weed through the masses to find the truly skilled people.

Because contract training is a growing area, I think we have to establish several things. One is a way for the organizations that are hiring contract trainers to differentiate between the good and the not so skilled ones. And trainers have to establish more ways to market themselves, make themselves better, and develop the skills and knowledge base that will work across industry lines.

Successful contract trainers have to be very good speakers and listeners, must have experience and skill in manipulating audiences (in the most positive use of that word), need a high energy level and a sincere interest in people, and have to have an educational background that gives them credibility in various kinds of industries. I don't care what industry or business most of your clients are in, you have to come across as an intelligent, lively, sophisticated person in order to be a successful contract trainer.

The recommendations

1. Don't think you know it all; you have to keep up with what's going on in the training business. You need to go back and work with people time to time who can point out your strengths and weaknesses.

There are all kinds of seminars for trainers on things from how to use a flip chart well to using video more effectively. You need to know all kinds of technical things now, just like an actor has to know how to do dialects. There are many areas that trainers have to be skilled in, and unless you renew these abilities every now and then you won't be able to stay on top of things.

2. Even if you have worked in a certain industry before, keep in mind that if you worked in, say, New York and you now are being asked to work in San Antonio, you'll probably be dealing with a whole different culture and outlook. You must be able to mold yourself and how you present yourself to each group. The training framework always will be basically the same, but you have to be able to mold your personality and style depending on the industry and the education, age, and experience of the participants.

Remember that you are selling yourself and your skills, rather than a specific material. All you have to present is yourself and what the client is buying is your personality, way with words, and way with people. So the more flexible you can be, the more successful you'll be with different groups.

3. Before you even get an assignment, you should develop a list of standard questions that you will always ask and another list of materials and documents that you will always want. Don't go into each assignment as though you're reinventing the wheel.

Each time you take an assignment, ask the person who hired you to give you any reports, internal memos, and other kinds of documentation you can gather immediately. You need that right up front because it will take some time to get it all together. If the program that you will be presenting is not one that you wrote, be sure to get those materials in advance. You also want your client to identify one or more subject matter experts to whom you can speak.

When you can, visit in advance the business, plant, or office in which you're going to work. This will give you a feel for what

the organization and its people do. Reading and hearing about a business doesn't compare to watching people doing it.

4. Be very careful not to pretend to be what you're not. You never need to be embarrassed or in any way feel inferior because you are not a subject matter expert. If your client wanted a subject matter expert, that's what it would have hired. Let the client know that you need to learn, and take in all the data that it can provide. What you have been hired to do is take what you learn, present it to others in a professional manner, and make it work.

5. It's very important to listen very carefully, not just to get information but to learn the language of the industry and of that company. If you know and use a few buzzwords that are familiar to the participants in your program, they feel much more comfortable with you.

6. Remember that you always can use program participants for technical knowledge. You can learn a tremendous amount about the industry from that group. Participants are delighted if you ask them for information about what they do and how they do it. Never feel as though you're a fraud; the participants know that you are the training expert and will respect you as an educated, skilled professional.



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