

Hang Up Your Training Hat

BY RUTH COLVIN CLARK

Traditional training may not be the solution to your organization's performance problems. Here are several steps for turning an internal training function into a consulting or performance-technology center.

How many times have you been asked to provide training when you knew training wasn't the answer? Too many times, if you're like most of us in the training business.

My first major training assignment turned out to be a nontraining need. The utility company where I worked was getting too many complaints from customers about abrupt and rude service from telephone representatives. Customer-service managers came up with a classic solution: training for the customer-service representatives (CSRs) in telephone courtesy.

When the training department conducted a quick performance analysis, it found that a job standard for CSRs required them to handle at least 120 calls a day. Representatives who consistently failed to meet the standard were counseled by their supervisors.

We told customer-service managers that the CSRs would probably continue to treat calls abruptly (and perhaps rudely) as long as job standards, feedback, and incentives were tied to the number of calls handled. The CSRs would do what the company seemed to require: handle each call quickly in order to answer the next call.

To the credit of the customer-ser-

vice managers, they changed the job standard, reducing call counts to 90 per day. They also instituted a checklist supervisors could use to monitor customer calls and give feedback to the CSRs. But the managers still wanted the representatives to receive training, which we provided. Chances are that it wasn't our training that eventually reduced the number of customer complaints; it was the changes in the performance environment: different job standards, feedback, and incentives.

Quality guru W. Edwards Deming said that 80 percent of all quality problems are not due to a lack of knowledge or skills. In other words, the problems don't need training "fixes." Still, many of us in human resource development spend a lot of time churning out training programs. And we don't always follow up with job-related evaluations to determine the outcomes. We assume that the training solved the problem, but we don't always take the time to prove it.

As training professionals, we often complain that we get too many requests for programs and that managers aren't willing or patient enough to support needs assessments. That shouldn't surprise us—

not while we hang training shingles over our doors and wear training hats. As long as we keep dousing organizational fires with training, our clients are likely to keep turning to us in crises for only one kind of intervention: training.

New shingle, new hat

You can turn the training function in your organization from a reactive "training factory" into a proactive consulting practice. Training will become just one of the many interventions you will be able to provide. The major service will be needs assessment, though you may substitute the term "analysis." In effect, you will create a performance-technology resource center, and you will become a performance technologist.

A performance-technology center isn't necessarily about using electronic performance-support systems. It is about optimizing work performance to meet organizational goals and objectives. A traditional training department is about solutions. Typically, training is a reactive response to an organizational problem, a new technology, or new employees. Performance technology also can be reactive, but its emphasis

is on proactive practice.

The goal of a performance technologist is to help managers make the most of their work environments to achieve business objectives. A performance technologist starts with business goals and indicators instead of a training intervention. The process begins with a performance audit to define the optimal work conditions for achieving desired goals and indicators.

The performance-technology operational model on this page shows how business goals and their associated indicators are used to drive specific project goals or "optimums."

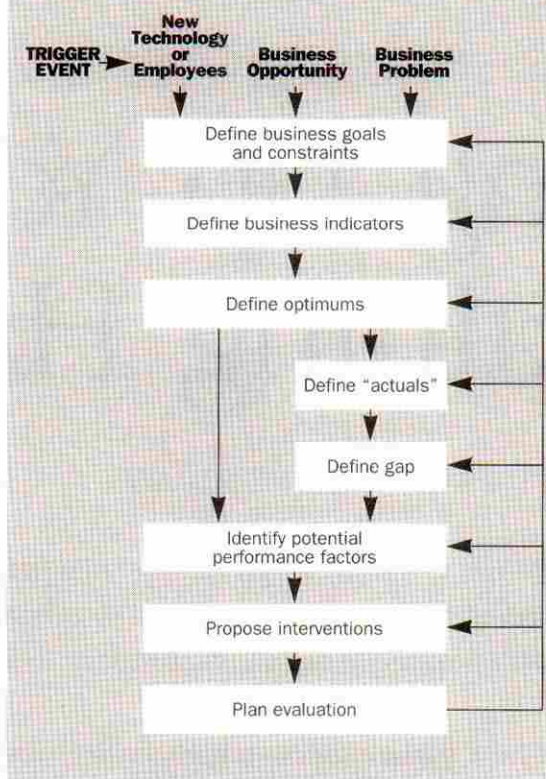
For example, suppose that a software-production company wants to ensure that its telephone product-support service is "outstanding"—in other words, that it is competitive. The company defines one indicator of outstanding service as the number of calls in which CSRs resolve requests or complaints without having to recall customers. Based on the indicator, a specific goal is set: 90 percent of all calls should be taken care of within five minutes, without requiring recalls.

To compare the goal with actual performance, the performance technologist checks the telephone operators' help-desk logs. On the first check, the logs show that only 60 percent of problems are resolved within five minutes, on the first call. A gap of 30 percent exists.

Once a specific goal and performance gap are defined, it's time to look for possible causes of the gap. In this example, a performance technologist wouldn't assume that the only possible cause for the 30 percent gap is the operators' lack of knowledge or skills.

The performance technologist evaluates the operators' job function and considers a variety of performance factors. Then he or she collects data on the performance environment—including job standards, feedback, and incentives. The performance technologist might conduct focus-group sessions or interviews with customer-service managers,

A Performance-Technology Model



effective and ineffective operators, and external customers.

The performance technologist might examine the data from the help-desk logs to detect patterns in customer complaints that don't get resolved. Performance tests and "shopper studies"—in which hired shoppers pose as customers to rate a company's customer service—can show whether operators lack the necessary skills or whether other performance factors might come into play.

Perhaps the operators are using bulky, poorly written manuals. The performance technologist might recommend an on-line expert system or better product-support documentation for customers. Or, perhaps skills training is needed for the operators.

The main point: Don't jump to a training fix without first considering the possible causes of the problem. Once the actual cause or causes are known, then the performance technologist can choose an appropriate intervention. When training is necessary, it's important to focus on knowledge and skills that are related to business indicators.

An evolutionary, six-step approach

Many trainers fear analysis paralysis. But effective analysis doesn't have to take a long time. In *Figuring Things Out*, Ron Zemke and Thomas Kramlinger suggest this rule of thumb:

"In 20 to 40 working days, you can conduct 99 percent of all the performance-problem studies you're ever called on to perform. In this era of future shock and rapid technological change, by the time you...call a task force and take a year's studies, half of the jobs involved in the performance problem may no longer exist."

If you have been in a traditional training department for a while, you probably don't want to disband it overnight. Here is a more evolutionary, six-step approach:

- ▶ Set up a consulting center in the existing training department.
- ▶ Define the center's mission, goals, scope, and function.

- ▶ Get to know your company's business by conducting an organizational scan—a broad view of such issues as past problems, future goals, and current barriers.

- ▶ Formulate and market the consulting service.

- ▶ Meet with decision makers.

- ▶ Measure results, market your success, and learn from your mistakes.

Setting up a consulting center. You can start small, with just two full-time and three or four part-time staff members. Even if the company is large, you will want to start with a small core group until the center is operating effectively.

Typically, part-time staffers will have to divide their attention between applying the new consulting approach, and producing and delivering current training needs. They may neglect the consulting work in favor of the more labor-intensive demands of actual training. Consequently, it's important to have at least two full-time staff members devoted to consulting.

Defining the mission, goals, scope, and function. You can create rough drafts of your consulting center's

mission on your own before you hire new staff members or with them after they're hired. The organization's culture will help shape the mission.

Here is a kind of "vanilla" mission statement you can use as a starting point:

"To work together with line managers to improve measurable business-performance indicators by defining employees' performance-support needs and by recommending appropriate interventions."

The mission statement should include these features:

- ▶ The consulting staff shares the responsibility for projects with the internal customers or clients, who are usually line managers.
- ▶ The consulting staff selects projects having business indicators that are linked to customer satisfaction and business goals.
- ▶ The consulting center's main focus is improving employees' work performance, including making such recommendations as implementing electronic performance support.
- ▶ The consulting center provides interventions or refers clients to external providers.

The goals, which are likely to change over time, should be more specific than the mission statement.

Typical first-year goals include

- ▶ conducting an organizational scan
- ▶ identifying several projects with a high potential for success
- ▶ completing and evaluating at least three projects
- ▶ planning and conducting a marketing campaign for the consulting center
- ▶ defining internal and external sources for interventions.

In defining the consulting center's scope, it's important to decide on the parameters for selecting projects.

Some suggested criteria:

- ▶ The initial, first-year projects must take no more than three months each to complete. The consulting center needs to generate some fast and potent results for the organization.
- ▶ Projects should have specific business indicators so that performance technologists can measure and demonstrate results and adjust interventions over time.
- ▶ Clients must take ownership of projects. Responsibility for each proj-

Typical Consulting Skills

- ▶ planning, conducting, and analyzing surveys and interviews
- ▶ using group-interview and group-consensus techniques
- ▶ conducting organizational analyses or mapping of actual work processes
- ▶ selecting and designing evaluation tools for products and procedures
- ▶ preparing and delivering reports on results and on recommendations of various performance interventions and intervention resources.

ect is shared by the consulting staff and the clients.

- ▶ The company should be willing to fund the consulting services and possible interventions.

To avoid potential pitfalls, consider rejecting projects that are too costly, lack clients' commitment, or can easily be carried out by the clients themselves. The center should bypass projects that have no measurable benefits, fall outside the consulting center's mission and scope, or are not linked to organizational goals or customer satisfaction.

It's also wise to avoid projects in which clients have already made up their minds about what interventions are needed.

After you've set parameters for choosing projects, consider which training staff members might be effective in consulting roles. Consultative training requires different skills than traditional training. Current staff members may not have the necessary skills, so you might have to look outside the training department. If so, compile a list of duties and requisite skills, based at least in part on the consulting center's mission and goals.

If at least one person on the training staff is experienced in organizational consulting, he or she can team up with another staff member who has some basic consulting skills to become the consulting center's core team. But if the team is too green, the fledgling consulting center might get its wings clipped before it has a chance to get off the ground.

It's worthwhile to start with an experienced consulting staff. Or, you can bring in external consultants for the initial projects to help the consulting center establish credibility. In addition, using external consultants on initial interventions can serve as a learning vehicle.

Conducting an organizational scan.

Early on, set aside two to four weeks to interview top-level managers to define your organization's key business issues. The information can help the staff of the consulting center select projects that are more likely to gain support, yield measurable results, and reap benefits for the organization.

Ask senior-level managers these questions:

- ▶ What are the overall goals for the year and the next five years?
- ▶ What are the key issues driving the organization's different departments?
- ▶ How will new technology affect the organization's goals and bottom line?
- ▶ What must each department accomplish in the next year to be successful?
- ▶ What opportunities and challenges does the organization face?
- ▶ Who are the main customers of departments targeted for projects?
- ▶ How is customer satisfaction measured in the target departments?
- ▶ What are the main business indicators of the target departments?
- ▶ What negative and positive factors have affected the target departments in the past few years?

Use the data collected in the interviews to refine the consulting center's initial goals to fit overall business plans.

For example, suppose that the organization is about to downsize or restructure, and an organizational map—an analysis of work processes—can help managers plan the changes. The consulting center will need to build expertise in organizational mapping, or find external consultants who can teach mapping skills.

Formulating products and services.

Once an organizational scan has provided the big picture and helped refine the company's goals, the consulting center can specify its products and services. That will help

Typical Consulting Duties

- ▶ evaluating existing indicators of the company's goals
- ▶ working with managers to identify new business goals and associated indicators
- ▶ helping managers gather customer-satisfaction data
- ▶ helping managers and teams conduct analyses of products and work-flow processes
- ▶ developing reports recommending performance interventions
- ▶ providing interventions or intervention resources
- ▶ defining performance needs by conducting organizational analyses
- ▶ evaluating products and procedures
- ▶ interviewing supervisors, other employees, and customers.

identify the necessary in-house training programs or external resources and help sell the center to prospective clients.

Typical products and services include

- ▶ performance audits
- ▶ training evaluations
- ▶ organizational-map analyses
- ▶ team building
- ▶ evaluations on customer satisfaction and product quality.

Meeting with decision makers. Don't leave your first projects to chance. Identify and select several projects with a high potential for success. Then meet with the decision makers or line managers involved to propose and market your services.

During the meetings, identify both the long- and short-term difficulties line managers and other decision makers may be experiencing. Avoid creating unrealistic expectations, but try to generate some excitement about recommended ways to ease the difficulties. Take the time to explore the project's parameters so you can sell them to the decision makers and confirm that the project fits the criteria for success.

Evaluating results, marketing success, and learning from mistakes. It's important to collect data from the line managers involved in a project

in order to evaluate their levels of customer satisfaction.

Use the line managers and other internal clients or customers as spokespeople to market the consulting center's success. For example, you might get them to write articles for the company newsletter. Involve internal customers in your presentations. Ask them to discuss the consulting center's work with their colleagues.

When you debrief failed projects, ask the hard questions: Was the project inappropriate? Was there a way to know that sooner? Does the consulting staff need skills training? What can be done with existing projects to avoid similar snafus?

Don't forget visioning

Look down the road three to five years. Do you see an expansion of services and consultants in a separate consulting center within the training department? Or, do you see a gradual realignment of the existing training department into a new consulting organization that offers a range of interventions including training design and delivery? A long-term vision can help hone some of the early decisions on the consulting center's mission, goals, and services.

You may want to track training requests over the next two or three years to see whether your internal clients begin asking for help—but not training—before crises arise. Note the number of project-planning events you attend involving line managers. If in six months you receive several nontraining requests for help in planning and implementing business projects and in solving business problems, you're well on your way to realizing the vision of a consulting performance-technology center. ■

Ruth Colvin Clark is an independent consultant. She can be reached at 1702 West Camelback Road, Suite 303, Phoenix, AZ 85015.

To purchase reprints of this article, please send your order to ASTD Customer Service, 1640 King Street, Box 1443, Alexandria, VA 22313-2043. Use priority code BVM. Single photocopies, at \$6 each, must be prepaid. Bulk orders (50 or more) of custom reprints may be billed. Phone 703/683-8100 for price information.

The National Institute for a
New Corporate Vision Presents

TRANSFORMING THE SOUL OF BUSINESS:

PROFIT, COMPETITION AND
CONSCIENCE ON THE
NEW FRONTIER

February 7 - 12, 1995
Hilton Head
South Carolina

An extraordinary opportunity to learn innovative techniques for making a profit while making a difference. Leading experts share practical, step-by-step strategies for building your company and making it thrive.

For more information, contact:
NINCV • P.O. Box 523
Mansfield Center, CT 06250
1-800-500-5984

Circle No. 170 on Reader Service Card

It's Not Too Late!

YOU CAN STILL GET COPIES of ASTD's blockbuster 50th anniversary report on the past, present, and future of learning in the workplace. All the trend information you need to keep your career on track and keep ahead of changes at work.

- Survey data about the growth of the training industry over the last ten years.
- Predictions from gurus like Tom Peters and Ken Blanchard
- Trends in business, technology, and training ranked by HRD executives
- A photo essay of training in the 40s
- An illustrated timeline of workplace learning from the industrial revolution to the information superhighway

A LIMITED-TIME OFFER.

Call ASTD Customer Service at 703/683-8100. Ask for the 50th Anniversary Supplement to *Training & Development* magazine. Only \$10.