



Performance Consulting: The Art and the Science

by Dana Gaines Robinson and James C. Robinson

Matt is frustrated. His client, the director of Customer Service, has requested refresher training in customer service skills for all employees who have customer contact. It seems that the customer satisfaction numbers are drifting lower. The director wants this refresher training even though these employees were trained in customer service skills when hired.

Matt's Dilemma

Matt is convinced that training, by itself, will not give the director the results he expects. In a meeting with the director, Matt shares his concerns in this manner: “Before any training is delivered, I need to conduct a performance analysis to determine the gaps between the desired and current on-the-job behavior of the customer contact employees. Also, I think it would be best if I do a cause analysis; this will identify the reasons for the gaps between the desired and current behavior. After that, I’ll be able to recommend appropriate interventions based on the root causes of the gaps.”

The director responds, “In a perfect world, all that may be good to do, but I need action now—not a bunch of analysis. This training will at least emphasize the importance of customer service. It certainly won’t hurt.”

What went wrong in this conversation that resulted in the client’s resistance to Matt’s approach? Matt is experienced in the area of performance improvement. He knows that refresher training by itself will not solve the director’s problem of falling customer satisfaction ratings. Yet he now is in a position to either deliver the training as requested or be viewed as nonsupportive by his client.

Let’s look at Matt’s situation in greater detail and why he did not succeed in influencing the director. His major mistake was that he assumed the role of an expert. He *told* the director that a performance and cause analysis was needed before training could be conducted. He used Human Performance Technology (HPT)-speak, not language familiar to the client. Matt advocated his point of view about what he believed to be best.

This created resistance in the director, who then pushed even harder for the training to be conducted. What Matt did not realize was that performance consulting is both a science and an art. The science is the technology of human performance improvement, such as a performance analysis, cause analysis, and intervention selection. The art focuses on the building of strong partnerships with clients—partnerships based on credibility, trust, and deep knowledge of the client’s business.

The Science

In the foreword to the first edition of the *Handbook of Human Performance Technology*, Tom Gilbert asks readers to look at HPT as a science (Stolovitch, 1992). He describes the characteristics of a science, as it relates to HPT, in this manner. A science:

- Has clear subject matter—in this case, HPT.
- Simplifies focus—in this case, focuses clearly on improving human accomplishments.
- Is grounded in measurement—measuring of human performance.
- Is careful of its language—has consistent terminology that is understood by practitioners in the field.

Certainly this advice by Gilbert has served our field well. Our profession has followed his advice and created HPT within a scientific framework. We have used the tools and techniques of HPT to bring about significant improvement in human performance in our organizations. The techniques and practices of performance and cause analysis, intervention selection, and measurement are based on scientific principles. When used appropriately, the techniques and practices can bring about sustained changes in human performance and result in achievement of business and organizational goals.

The Art

But how do we engage managers in HPT principles and techniques? In today’s fast-moving global economy, managers are under pressure to make quick decisions, take fast action, and achieve immediate results. To work effectively with these managers, we must view HPT as both a science and an art. While the science refers to the practices, tools, and techniques of HPT, the art refers to how consultants seek to understand managers’ needs and influence managers to support the use of HPT. The science is the what; the art is the how.

We have interviewed and observed many performance consultants. Our conclusion is that when consultants develop strong, positive partnerships with managers, they are more successful in influencing managers to follow sound HPT practices. Three factors are essential to building these strong, collaborative relationships with managers who have responsibility for business results: access, credibility, and trust (Robinson & Robinson, 2005).

Access

Access is identifying and gaining face time with those individuals who “own” business and performance needs within the organization you are supporting. The two major elements of access are identifying your clients and gaining face time with those individuals.

To have real impact on business results, we need to accurately identify the true client. Not every manager is responsible for business results, so we must determine who is accountable for achieving those results. This manager, or this management team, must have the power or authority to make things happen, including changing the work environment. We seek clients who can obtain the resources required to implement a performance change initiative. Of course, these clients are part of the chain of command of employees whose performance must change.

When first assigned to support a business unit, identify the business leaders who meet these criteria. Gain face time with these managers. Your goal is to be on their radar screen when they have a project that involves changing human performance or achieving business goals. Frequent contact with these managers is essential to maintaining your awareness of projects just over the horizon. This enables you to be proactive in the work you do to support client needs.

Once you have identified those business leaders who should be your clients, how do you gain access? You do this by initiating contact with the business leaders and setting up time to meet with them. In these meetings, discuss their *business* goals and challenges, not their learning needs. Focus on the business goals they need to accomplish and the factors that will help or hinder goal accomplishment. Although you may mention the purpose and services of your department, do not make that the primary focus of the discussion. By focusing on your client’s goals, you demonstrate that you are interested in and knowledgeable about that business. This way the client sees you as a resource for achieving business goals rather than an individual who provides learning solutions and conducts performance analysis. We are reminded of an organizational officer who, on concluding this type of conversation with a performance consultant, remarked, “I get it. You want to learn about my needs and how you can support me rather than asking me to learn about your services and how I can use them.”

Performance consultants influence more by what they ask than by what they tell. By asking questions such as, “How will that goal impact what you expect the field engineers to do on the job?” you are influencing your client to think about job performance, not just about training. When you ask, “What must the field engineers do more, better, or differently to achieve that goal?” you are influencing your client to link human performance to business goals. Asking questions not

only expands your clients' thinking, but it also positions you as a person who is interested in and knowledgeable about their business and goals. As one manager said, "When meeting with me, the consultant helped me to answer questions I didn't even know I had."

Credibility

Credibility is your client's confidence in your capability to deliver results to the business.

When you have developed credibility with your clients, they are confident you will deliver the agreed-on results, including the criteria and standards that were discussed. Your clients believe you will take actions that will have a positive impact on employee performance and business results. To gain this credibility, position yourself as a person who has a deep understanding of your client's business goals, challenges, and strategies. When assigned to a project, demonstrate enthusiasm for the assignment and an eagerness to get the project moving quickly. Your client wants and needs results as soon as possible.

Your credibility will increase when you demonstrate your willingness to share accountability for the business results and performance change. Show that you expect to be judged on results, not just implementation of solutions. Demonstrate this in conversations with your client by linking your activities within the project to the business results the client must achieve. A successful performance consultant is a businessperson who happens to specialize in the human side of the business.

A most critical skill for building credibility is to "connect the dots" within and across the business unit. One performance consultant described it this way: "I talk about initiatives occurring in another part of the business and raise questions about the implications of those initiatives for this business I am supporting." When connecting the dots, you demonstrate that you see how the project impacts not only your client's business, but also other parts of the organization.

Trust

Trust is your client's confidence in your integrity and reliability to achieve results in support of the business. You have developed trust when your clients are confident that your moral and ethical code supports the values of the business and reflects how you will implement projects for which you are accountable. When trust has been developed, clients believe that the actions you take will be in the best interest of the organization. Often during performance analysis you may uncover information that is embarrassing or even detrimental to the organization. However, your client has confidence that you will handle this information in a manner that is helpful

to the organization. As one performance consultant said, "I try to be a model of our culture's values and norms."

You will know that you are trusted when your clients seek your advice and share confidential information. You will find that you become a sounding board for sensitive issues. Clients will value your ability to look at issues with a "performance viewpoint" and share your opinions and perspectives, even when they are different from those of their own. One line manager said, "I see [my consultant] as a straight-shooter. She objectively discusses the issues and draws conclusions that I respect."

Getting Back to Matt

Certainly Matt's knowledge and expertise in the *science* of HPT enabled him to size up the situation correctly. Refresher training by itself would not result in the improvement in customer service ratings the director expected. What was missing was the *art* of partnering with the client.

To evidence the art of HPT, Matt needed to have developed a partnership with the client based on credibility and trust. He also needed to approach the situation from the client's perspective. Then he could engage the director by asking thought-provoking questions such as these:

- "What have you observed that leads you to believe customer service training is needed?"
- "Are there any star customer contact employees who *are* achieving strong customer satisfaction ratings? What are they doing differently than the others?"
- "If we were to provide the training, can you think of any reasons why the customer contact employees would find it difficult to perform as you need them to?"
- "On a scale of 1 to 10, how confident are you that the refresher training, by itself, will yield the results in customer satisfaction ratings you seek?"

Notice that nowhere in these questions are the phrases "cause analysis," "performance analysis," or "intervention" used. These questions use language and terms that directly connect to the client's business needs.

Matt's strength was his knowledge and expertise in the tools and techniques of performance improvement technology. However, in this case, his strength became his weakness in that, as an expert, he told the director what to do rather than work in a collaborative manner.

Summary

Certainly as performance consultants we want to have an impact on human performance and the goals of the organization. To do this, it is crucial that we be proficient in both the art and the science of performance consulting. Only by utilizing both the art and the science can we engage our

clients, bring about sustained improvement in human performance, and contribute to business results in organizations. 🏔️

References

Robinson, D.G., & Robinson, J.C. (2005). *Strategic business partner: Aligning people strategies with business goals*. San Francisco: Berrett-Koehler Publishers.

Stolovitch, H.D. (Ed.) (1992). *Handbook of human performance technology: A comprehensive guide for analyzing and solving performance problems in organizations* (1st ed.). San Francisco: Jossey-Bass Publishers.

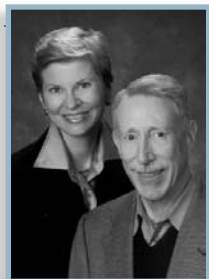
Related Readings

Block, P. (2000). *Flawless consulting: A guide to getting your expertise used* (2nd ed.). San Francisco: Jossey Bass/Pfeiffer.

Bossidy, L., & Charan, R. (2002). *Execution: The discipline of getting things done*. New York: Crown Business.

Charan, R. (2001). *What the CEO wants you to know: Using your business acumen to understand how your company really works*. New York: Crown Business.

Robinson, D.G., & Robinson, J.C. (1995). *Performance consulting: Moving beyond training*. San Francisco: Berrett-Koehler Publishers.



Dana Gaines Robinson and **James C. Robinson** are the President and Chair, respectively, of Partners in Change, Inc., a consulting firm formed in 1981. Based in Pittsburgh, Pennsylvania, the firm provides services to organizations around the world.

Together the Robinsons have coauthored and co-edited several books, including *Training for Impact*, *Moving from Training to Performance*, and the award-winning *Performance Consulting*. With Ken Blanchard they coauthored *Zap the Gaps! Target Higher Performance and Achieve It!* In 2005, the Robinsons co-authored *Strategic Business Partner: Aligning People Strategies with Business Goals*, which provides practices and requirements for human resources, learning, and performance professionals to successfully work in the role of business partner within their organizations. Collectively, their books have been translated into more than 20 languages.

They have been awarded the American Society for Training and Development's Distinguished Contribution to Workplace Learning and Performance as well as the Thought Leadership Award from ISA. Dana may be reached at drobinson@partners-in-change.com, and James may be reached at jrobinson@partners-in-change.com.

ISPI
Gold Sponsor

How can you impact *Performance*

if employees
aren't engaged?

Do you know?

In a typical U.S. company, what
percent of the workforce is engaged?

■ 82% ■ 61% ■ 44% ■ 29%

The answer is at www.corporatelearning.com.
Click on the white paper "**Engaging Employees
to Impact Performance**" under *Resources*.

And for answers to your workforce performance
challenges, see Bellevue University. We're leading the
nation with ground-breaking ideas on developing,
measuring, and monitoring corporate learning
programs that align with business goals.

866-827-8467


BELLEVUE UNIVERSITY

Real Learning for Real Life.

Accredited by The Higher Learning Commission of the North Central Association of Colleges and Schools • 30 North LaSalle Street, Suite 2400
• Chicago, Illinois 60602-2504. Bellevue University does not discriminate on the basis of age, race, color, religion, sex, national origin, or
disability in the educational programs and activities it operates.