

# Training and Consulting:

## Which is Needed When?

### (A Note for Potential Clients)

John J. Scherer

If you are an internal Training Director or Human Resource Lead looking to hire a training resource, this open note might turn out to be useful to you. I hope so. . .
--

#### Training: Knowledge, Skill and Structure

A *training program* is usually intended to impact individual participants' **knowledge** about some subject of importance to the organization, like conflict or leadership or communication. With this focus, *information is presented*, hopefully in experiential ways, where people are involved in activities that generate felt need for the knowledge or concepts. When the event is over, participants will KNOW THINGS they did not know beforehand—or it will help make what they *did* know more vivid or useful.

Quite often training also intends to increase individual participant's **skill** in an area, e.g. conflict, leadership or communication. This means that applying experiential learning principles is even more important, as well as lots of practice and feedback—the only way skills are improved. When this kind of training is over, individual participants will know how to DO THINGS better than they did when they came in the door.

The third focus of training, **structure**, is the one that has the most direct impact on the organization (or sub-group, like a team or department) and its performance. An intervention of this kind is not actually training, but begins to move into another approach, which I am calling 'consulting' here. Quite often this approach *does* involve some training, but the focus is not so much on improving the ability of the *individuals*, but on making changes to the way the *system* does what it does. When this intervention is over, THE SYSTEM DOES THINGS BETTER, and by-the-way, it also adds to the knowledge and skill of participants.

#### Individuals and the System

Training almost always has an impact on individual participants. *Good* training has *profound* impact on individual participants. *GREAT* training, however, is training that happens *inside a (consulting) context* of a long-term, strategic process intending system-wide impact. It is an intervention aimed at resolving some business/operational problem or challenge—or achieving some possibility for the organization or a sub-system. This kind of 'hard' business result requires a different kind of initiative—and conversation. Because the problem or challenge being addressed does not only exist inside *individuals*—or even within

the group being trained—but *between* groups and levels, in the way things are getting done, the way decisions are made, the relevance of processes and procedures, the clarity and presence of roles and goals.

Quite often, a problem showing up in work group A turns out to be caused by things happening—or not happening—in groups B, C & D. Like many health problems, the issue you are being asked to help resolve is actually a symptom of other dynamics in that larger system.

Also, a training program, no matter how powerful, rarely impacts this deeper systemic reality. We have a saying in my field, '*The organization's DNA (culture) will eat your training program for lunch every time*'.

What is needed may be an intervention *aimed directly at the system's DNA*, something designed to 'change the game' in the organization. For this to happen, there have to be sustainable changes created in things like:

- Policies and procedures (what are they attempting to ensure)
- Reward or Incentives (what are they reinforcing)
- Interactions between organizational units and levels (how 'straight' they are with each other)
- Communication—up, down and sideways (how honest and frequent it is)
- Problem-solving (or, as we prefer to look at it, 'breakthrough action-planning')
- Decision-making (where authority is located and how clear the process is to people)
- Accountability (the consequences for high and low performance)
- Leadership (how well the energy in the system is being aimed and sustained).

The following matrix might help:

	<b>T R A I N I N G</b>	<b>C O N S U L T I N G</b>
<b>Primary Focus of Intended Impact</b>	The <i>Individual</i> , with hoped-for spill-over into Teams and the Organization	The entire <i>Organization/System</i> , with intended impact on Individual Participants and Teams
<b>Typical Client (Who calls?)</b>	HR/Training Director	CEO or Senior Executive, often from an Operational Unit, working with a cross-functional team of selected internal resources
<b>Nature of Relationship</b>	Trusted Vendor or Occasional Helper when requested. Short term.	Trusted Strategic Business Partner. Long term.
<b>What Drives the Agenda</b>	Content or <i>Curriculum</i> -Driven	<i>Business Results</i> -Driven
<b>Nature of Intervention</b>	<i>Program</i> , with a Beginning and an End	<i>Process</i> that lasts until results are achieved
<b>Source of Content</b>	The Trainers/Facilitators, in consultation with client	The Client, in consultation with Consultant(s)
<b>Who Makes Decisions</b>	Client explains to the Trainers what needs to be done	Client and Consultant decide together what needs to be done
<b>Where Curriculum or Content comes from</b>	Comes from Client's schedule or data, eg Employee Satisfaction Survey	Comes from data gathered by Consultant working with Client-based resources
<b>Skills Required</b>	Training, Group/Individual-Facilitation	Training, Group/Individual-Facilitation, Organization and Team Development, Data-Gathering & Diagnosis, Business Acumen, plus Systems Theory
<b>Client Responsibility</b>	Contract with Trainer, Observe or Participate in Program, Evaluate Results	Contract with Consultant, work with Consultant to set mutually-agreed on objectives based on data gathered, work with consultant throughout the process, clear obstacles for Internal Team, hold Consultant accountable for results, evaluate results

### **How to Turn a Training Program into an Intervention with System-Wide Impact**

If you are a potential *client* reading this. . .

When you call an outside resource for help, you have already figured out what you *want*. That *may* be exactly what you *need*. But it might not be. Contact a *training* company for help and, as I described above, they would probably continue the conversation with you about the content of the training, the amount of time and resources available, and other details needed to design a great *program*—all based on your request.

When you contact a *consulting* firm, one that understands what I am saying here, and ask *them* for a training program, you may receive a slightly different response. A consulting approach wants to work with you in determining exactly what you *need* and providing that at the best possible balance of impact, price, and demands on people's time.

The consultant may ask you a few questions intended to make sure that the *training* program you are requesting will, in fact, get you the results you need. Their challenge will

be to talk with you in a way that you know that they are on your side, wanting to help you accomplish your objectives, possibly even more than you may have realized.

It doesn't take much to build in at least some system-wide/business impact into a training program. You may not need to launch a year-long consulting initiative, but there are several relatively easy and inexpensive things you can do within a training program request to increase its value to the organization and its mission:

1. **Let the outside resource talk with the Owner of the unit(s)** from which the participants are coming. This gives them The Big Picture from the leader's perspective and creates a little more curiosity or interest in them about results.
2. **Train people in their natural work groups.** This increases back-home transfer of learning and permits the use of real-world examples in the training program.
3. **Allow for some pre-event data-gathering,** like face-to-face or telephone interviews with a sample of participants—including a few 'negative' people. This gives a VERY useful picture of the reality of those who will be in the room and helps 'aim' the content and level of what they do with you.
4. **Create a small cross-functional team to work with the firm in planning.** This means that there will be at least a critical mass of participants who 'own' the design and the process—and who will come into the room ready to participate to the maximum.
5. **Invite selected stake-holders from around the unit being trained.** I know it is scary to consider, but this one is *magic*. By inviting people from the units you have to interact with to get work done, you *multiply* the back-at-work application and value of what happens in the training.

Hope this helps you think about how to get the most out of your next call to us at Scherer Leadership International . . .

-- John J. Scherer