

Session M202
Performance Consulting 2.0:
What's the Same and What's Different?

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Session Learning Objectives:

1. Define the primary similarities and differences between how performance consulting is practiced today as compared to the early 1990s.
2. Anticipate the future trends from this role.
3. Assess your performance as a performance consultant compared to current best-in-class practices using a tool to be provided.

“The future ain't what is used to be.”

Yogi Berra

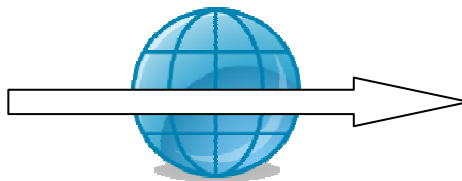
The Role

Performance Consulting began to appear in the profession in large enough numbers to be noticed in the early 1990s.

The Book

Performance Consulting was published in 1995 and was based upon research completed in the early 1990s.

The World in 1990s



The World Today

Buzz Group Exercise

Reflect upon the last 15 years and identify the three changes you believe had the greatest impact on those of us who work in the *human resources/learning and development profession*.

Definition of Terms

What Is Performance Consulting?

Performance Consulting is a process in which a client and consultant partner to accomplish the strategic outcome of optimizing workplace performance in support of business goals.

Jim and Dana Robinson
1995 and 2008

<i>Client</i>	The individual(s) who own accountability for accomplishing the business goals supported by the project.
<i>Strategic Outcome</i>	Results that directly advantage and benefit the business.
<i>Workplace Performance</i>	What people actually <i>do</i> in their jobs and the support required to make that possible. This outcome is solution-neutral and not solution-focused.

Strategic or Tactical?

Which of the following are strategic results as stated?

Strategic Result	Tactical Result
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<input type="checkbox"/>	<input type="checkbox"/>	Enhanced the capability of our employees to be more innovative and creative.
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<input type="checkbox"/>	<input type="checkbox"/>	Implemented a change strategy for managers to use throughout the global organization.
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<input type="checkbox"/>	<input type="checkbox"/>	Developed safety skills of all operators and supervisors.
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Three Categories of Work

Transactional

Identifying and addressing needs of **individuals**



Tactical

Identifying and addressing needs of **workgroups**



Strategic

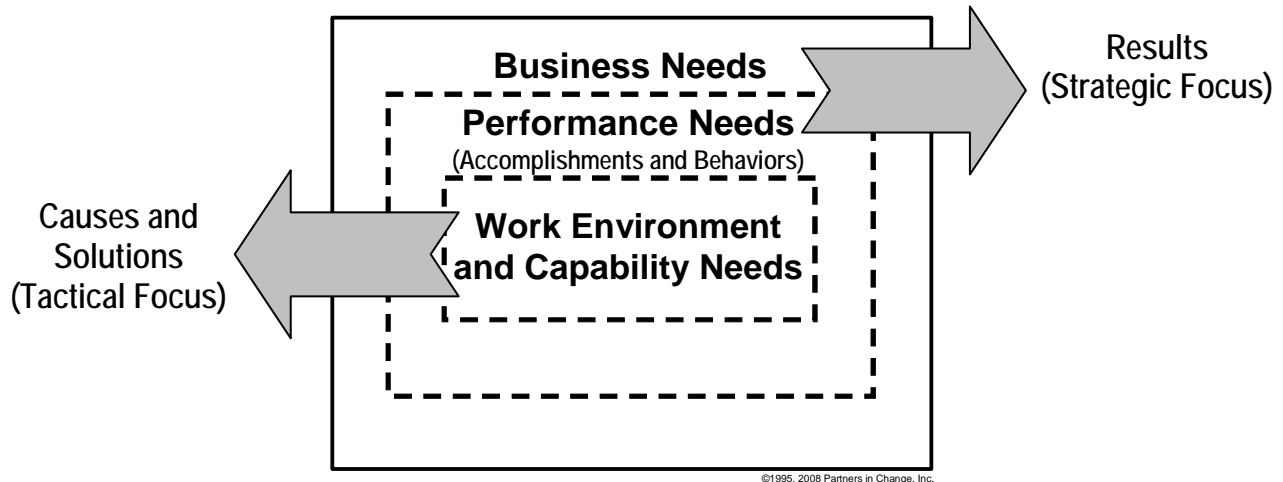
Identifying and addressing needs of **entities and/or the entire enterprise**



EXAMPLES	<p><i>"What suggestions do you have regarding leadership development programs for one of my managers?"</i></p> <p><i>"I'd like your suggestions on how I should manage a difficult conversation with one of my employees."</i></p>	<p><i>"I want to build customer service skills in my service representatives. What program do you have that they could attend?"</i></p> <p><i>"My managers need capability to diagnose and identify skill gaps of the people they manage. What training can you recommend?"</i></p>	<p><i>"Our business has been losing market share for our signature brands in the past three years. Our strategy is to fast track some new products. I want to ensure everyone is aligned to deliver on our goals."</i></p>
CHARACTERISTICS	<ul style="list-style-type: none"> ▪ Primarily requires providing information or coaching support ▪ Quick turnaround expected 	<ul style="list-style-type: none"> ▪ Focused on design and delivery of solutions ▪ Requires substantive resources: time, people and money ▪ Can be implemented integral to a strategic initiative or independent of one 	<ul style="list-style-type: none"> ▪ Directly linked to one or more business needs...truly advantaging the business ▪ Solution-neutral for some period of time ▪ Long term in scope (one to five years) ▪ Requires multiple solutions, some of which will likely be from outside Learning and Development

Performance consulting is a process used to achieve strategic results.

Key Principle of Performance Consulting Need Hierarchy



Business Needs

Operational and/or strategic goals for an entity (i.e., a unit, department, or organization). Business needs are expressed in operational terms and are typically measured in numbers.

Example: Grow market share.

Employee Group and Performance Needs (Accomplishments and Behaviors)

On-the-job behavioral requirements of people who are performing a specific job or role. These needs describe what people need to do more, better or differently if the business needs are to be met. Performance needs are measured behaviorally.

Example:

Employee Group: Account Managers

Performance Need: Account Managers need to form strategic plans for key accounts.

Work Environment Needs

The infrastructure within the organization, including work processes, information and incentives that are needed if people are to perform as required. Many work environment needs are intangible—you do not see them; you “feel” them.

Example: Account Managers require current and complete information on the buying history of each key account.

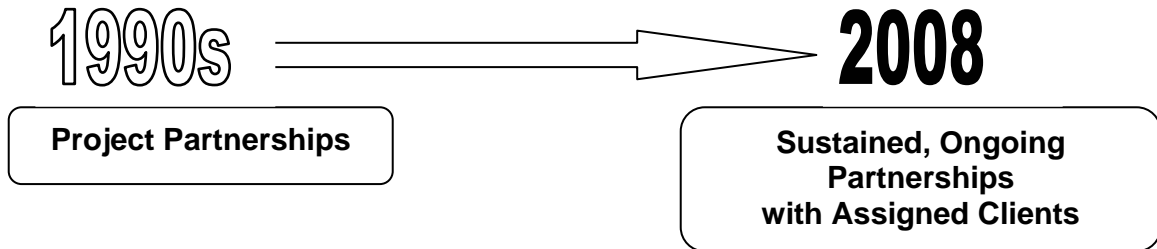
Capability Needs

The skill, knowledge and attributes required of people if they are to perform successfully. Capability needs also include job match and inherent capability.

Example: Strategic planning and account analysis skills are needed by the Account Managers.

Performance Consulting 2.0: What's Different?

1. **The level of partnering with management that is required and the depth of knowledge of the “business of the business” that this partnership demands.**



Group Buzz Session

Below is a starter list of information leaders indicate they expect their HR and learning partners to know about the organization/business. With others, add to this list to see how many other items you can identify as important to know about the “business of the business.”

Items You Need to Know About Your Organization

- The business and operational goals for the next 12 months.
- The metrics used to measure results and success of the organization.

What would you add?

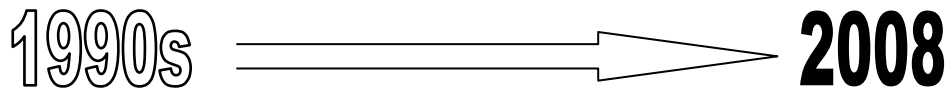
Also...

It is important to know the industry in which your organization operates and specific information about that industry such as:

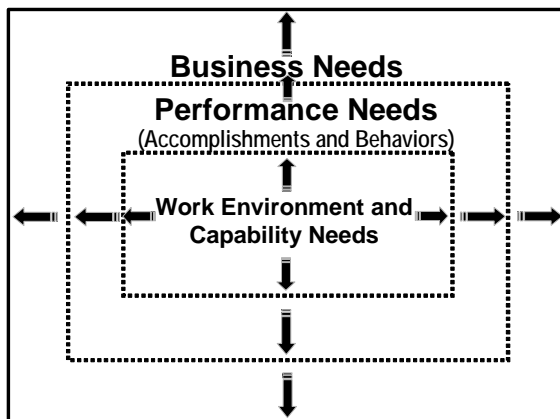
- **Other organizations that are key players in the industry.**
- **What differentiates your organization from others in the industry.**
- **Global factors that impact upon the industry.**

Performance Consulting 2.0: What's Different?

2. The emphasis to *proactively* identify opportunities on which to partner.

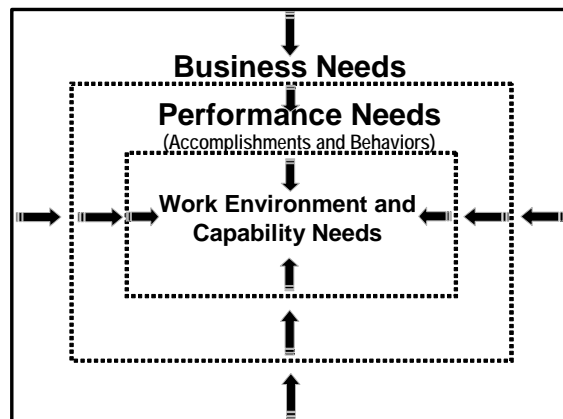


Reactive Entry



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Proactive Entry



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Managers contact us with a request for a specific solution.

"We are having an increasing number of customer complaints. Could you do some type of customer service training to refresh our skills in this area?"

Performance consultants ask questions to reframe the discussion away from a focus on the solution and towards a focus on the business and performance results the client seeks.

Performance consultants initiate access to clients for the purpose of discussing business needs and the implications of these for what people need to do.

Techniques:

- ✓ Send articles of interest and follow up with a discussion.
- ✓ Approach a manager who has a "burning platform."
- ✓ Set up standing meetings in which the only agenda item is to discuss the "business of the business."

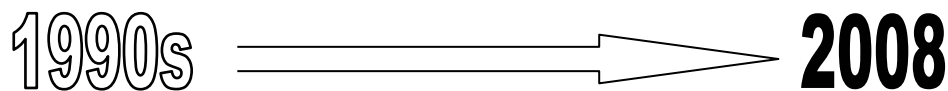
In the process of working proactively, and as knowledge of the business deepens, performance consultants gain insight as to how they can add value. They then initiate discussions with clients about these insights and opportunities.

Performance Consulting 2.0: What's Different?

3. The use of technology to accomplish assessment work associated with performance consulting.

The Assessment Phase of work is critical to success as a performance consultant. This is a *solution-neutral assessment*, designed to determine any/all of the following:

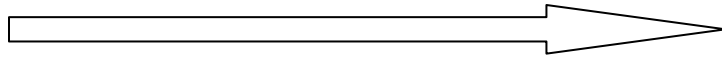
- What are the performance requirements for people in a specific role or job? What must these individuals do if the business results are to be achieved?
- What is the current performance of people in a specific role or job? Which of the performance requirements are in evidence? Which are not being performed as needed?
- What are the reasons why there are performance gaps?



- | | |
|--|---|
| <ul style="list-style-type: none">▪ Majority of work done manually so it was labor-intensive and time-consuming. This became a barrier to doing assessment at all. | <ul style="list-style-type: none">▪ Online searches.▪ Surveys via email.▪ Software to integrate qualitative data.▪ Response pad technology |
|--|---|

Future Trends

2008



1. Opportunities and need for performance consulting will increase.

- Project skills gaps and talent shortage.
- Global and competitive pressures for talent and business results.
- Continuing realization that people, and their collective intelligence, are the competitive edge in any organization.

"We must have the right people, in the right job, doing the right things, at the right times." Fortune 500 Executive

Numerous research studies have determined that executives *want* the voice of Human Resources "at the table." For example, the 2006 Accenture High Performance Workforce Study found that "over 65% of executives find HR essential to driving their business growth." Many ranked Human Resources as one of the top three most important functions/businesses within the organization.

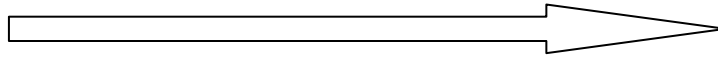
2. Alternative means for delivering transactional and tactical work will increase in usage. As a result, there will be greater resources available to focus on strategic work.

Following are just some methods currently used to deliver tactical and transactional work associated with Learning and Human Resource functions:

Learning Management Systems (LMS)
Other Electronic Self-Service Systems
Outsourcing
Off Shoring
Organizational Options such as
Shared Service Functions

Future Trends

2008



3. The Human Resource and Learning functions will integrate under the umbrella of “talent management” with performance consulting one process used to achieve shared goals.

“Recent research forecasts an ongoing convergence of training and human resources operations, all coalescing into a broader talent management function.” Tim Soshe, T&D Magazine, June 2007, page 37



Optimizing the performance of people is a shared and strategic goal across multiple functions within Human Resources and Learning.

Talent Management is the umbrella under which each function operates.

Performance Consulting is a process that can act as an integrator across various functions and disciplines.

Shared goals require shared processes.

SELF-ASSESSMENT TOOL

Assessing Current Skill to Demonstrate Practices Associated with Performance Consulting

On the following pages are four accomplishments produced by people who work as Performance Consultants; a selection of best practices for how these accomplishments are produced is also listed. For each practice assess two things:

IMPORTANCE to Your Work as a Performance Consultant	Your SKILL to Demonstrate the Practice
<p>1 =Not required for your work at this time.</p> <p>2 =Nice to have, meaning it is helpful, but not required.</p> <p>3 =Required, meaning the activity is something you are expected to do in support of the accomplishment.</p>	<p>1 =Basic Skill. You can perform this activity in routine situations, but need assistance at times to do so.</p> <p>2 =Adequate Skill. You can perform this activity in routine situations without assistance; you need assistance in non-routine situations.</p> <p>3 =Proficient Skill. You can perform this activity in routine and non-routine situations without assistance.</p>

Accomplishment 1: Client Partnerships Developed and Deepened

Definition: *Establish and deepen strong, collaborative and business-linked partnerships with selected leaders in your organization.*

Importance		Skill
1 2 3	1. Use criteria to identify those leaders with whom a partnership should be developed; form a relationship strategy to deepen the relationship as needed to ensure a strategic focus.	1 2 3
1 2 3	2. Develop access so that “face” time with these selected individuals is provided when requested.	1 2 3
1 2 3	3. Deepen the client’s confidence in your capability to deliver results to the business.	1 2 3
1 2 3	4. Foster trust so that the client has confidence in your integrity and reliability to deliver results in support of the business.	1 2 3
1 2 3	5. Grow and evidence deep knowledge of the “business of the business” using the language of the business in discussions with clients.	1 2 3
1 2 3	6. Verbally and behaviorally demonstrate that you share accountability with the client for business and performance results to be derived from HR/Learning solutions that are implemented.	1 2 3
1 2 3	7. Ask questions that expand the thinking of the clients.	1 2 3

Accomplishment 2: Strategic Projects Identified Proactively and Reactively

Definition: *Through discussions with clients and other leaders, identify strategic projects on which to partner where results will directly advantage the business.*

Importance		Skill
1 2 3	1. Respond to requests for HR and Learning solutions by asking questions that redirect the discussion to focus on the results the client seeks and not on the solution that was requested.	1 2 3
1 2 3	2. Initiate contact with clients and others for the purpose of uncovering business needs for which HR and/or Learning would be of value.	1 2 3
1 2 3	3. Ask powerful questions to influence the thinking of the client regarding a specific need or request.	1 2 3
1 2 3	4. Work with the client to translate business goals and problems into human performance requirements, determining information that is known and unknown regarding these requirements.	1 2 3
1 2 3	5. Push back on a client request when the solution that is proposed, and the results the client seeks, are not aligned.	1 2 3

SELF-ASSESSMENT TOOL

Assessing Current Skill to Demonstrate Practices Associated with Performance Consulting

Accomplishment 3: Assessment Projects Led and Supported

Definition: Form and implement data collection proposals and plans that assess requirements and gaps for one or more workgroups. Utilize information that is obtained to determine HR and/or Learning solutions required to address gaps and their causes.

Importance				Skill		
1	2	3	1. Form a data collection strategy and proposal identifying: <ul style="list-style-type: none"> ▪ Assessment purposes ▪ Methods to be used ▪ Sources to be used ▪ Timeframe and cost 	1	2	3
1	2	3	2. Contract with the client(s) for the assessment to be completed clarifying the responsibilities for the client and for you in the project.	1	2	3
1	2	3	3. Design and/or purchase tools for obtaining information.	1	2	3
1	2	3	4. Collect and analyze data, organizing into a report that will be shared with the client.	1	2	3
1	2	3	5. Keep the client engaged throughout the assessment phase of work, helping to ensure ownership of the results once they are reported.	1	2	3
1	2	3	6. Facilitate the meeting with clients in which results are reported; propose HR and Learning solutions for the clients to consider taking to address identified problems and gaps.	1	2	3

Accomplishment 4: Performance Change Projects Managed so Desired Results are Obtained

Definition: Plan, organize and monitor work done by self and others in support of projects which have as their purpose the enhancement of performance of people in one or more workgroups.

Importance				Skill		
1	2	3	1. With the client, clarify the business and performance goals for the project.	1	2	3
1	2	3	2. With the client, agree on a project plan, timeframe and mutual responsibilities for the project.	1	2	3
1	2	3	3. Form and organize work among a project team, if required.	1	2	3
1	2	3	4. Ensure resources required for success are available to you and other team members.	1	2	3
1	2	3	5. Alert the clients to problems, as encountered, determining how to address and overcome them.	1	2	3
1	2	3	6. Monitor progress of you and the team, ensuring milestones are met.	1	2	3
1	2	3	7. At the conclusion of the project, conduct a debrief with the team and the client in order to determine "lessons learned."	1	2	3