



Paul Kearns defines a new role for a new type of learning professional and business partner.

Throughout 2004, this series of articles aims to build a picture of a distinctly new role for the ambitious trainer, developer or learning specialist. It represents an exciting opportunity for readers who really want to push the boundaries of their own role. In effect, this is a 12-month, personal development programme for those who want to become learning consultants (LCs).

Part 1: How learning consultants bring maturity to the organisation

I used to call myself a 'trainer' until I realised that my own views on what the role should involve had taken a radical diversion from conventional thinking. So I started referring to myself as a 'businessperson who happens to work in training'. That's quite a mouthful, so I shortened it to 'learning consultant' or 'LC' – and note the emphasis here on learning, not training.

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In essence, LCs look for clear and specific business needs before they start to consider the possibility of a learning solution. You might think this still sounds very much like the traditional trainer's role, but there is a great deal more to this LC idea than meets the eye. So much more, in fact, that it will take a complete series of 12 articles to explain fully what this role entails.

A more accurate description of what I mean by LC is someone who is regarded by managers as an equal business partner whose expertise on learning matters is highly valued. Not only do LCs need to know everything there is to know about learning, both conceptually and theoretically, but also, and more importantly, they must have the credibility and skills to make it happen in the workplace.

This series is aimed at those already in a training role and new entrants to the function who are interested in moving onto a different platform altogether. Those who do are in great demand and attract a premium.

WHY DO WE NEED LCs?

Senior managers are currently putting pressure on training teams, not only to deliver more value, but to actually demonstrate that value, often demanding a clear return on investment (ROI) if possible. Such managers have completely missed the point. It is their own performance that will ultimately produce the right figures, not the trainers'. Consequently, they have to retain the responsibility for them. This can lead to an impasse, though – dissatisfied management and frustrated training teams.



For example, most organisations want better leadership skills. The need may be valid but the first question an LC asks is: 'What would better leadership look like in terms of business performance?' The next question is even more challenging: 'What are senior managers going to do themselves to help demonstrate the desired leadership qualities?' The buck cannot just be passed over to the training team without answers to these. Leadership programmes that only get lip service from senior managers are doomed before they start.

Working as genuine business partners, LCs will rarely find themselves in this sort of predicament. They will already have educated the board about what learning really means and what value it will bring when made effective. This is just a quick insight into the world of the LC. However, many other factors have conspired over the last 25 years to change the world of training significantly and irrevocably, resulting in a new role now being required.

- Global, multinational organisations require learning specialists who follow a sound set of universal principles but who design interventions flexible enough to work at a local level.
- The ability of organisations to change, in line with changing markets and customer expectations, means trainers not only have to be super-responsive but also strategic.
- Training is increasingly being seen as a potential source for gaining a competitive advantage, bringing trainers right up to the sharp end of the business.

- The range of skills required in management roles has grown rapidly (for example, project management, process analysis, people development, performance management), making coaching and mentoring more appropriate than standalone modules.
- Regulatory and compliance standards (for example, in pharmaceuticals and the financial services sector) have made some areas of training mandatory and mean that many high standards of basic training have to be met.



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- New concepts such as organisational learning, Knowledge Management (KM) and intellectual capital have made reactive, classroom-based training appear pedestrian and limited in scope.
- The range of learning intervention options (for example, e-learning, drama, coaching, Neuro Linguistic Programming – NLP) has grown exponentially, and can be overwhelming and bewildering to trainers seeking the best and most cost-effective methods.
- Training technology has changed significantly in the computer age and the need to balance benefits with costs, using techniques such as ROI. This means the role now requires professionals with a much higher level of business skills. ➤

► It is easy to see how the development of trainers presents us with a totally different challenge today. LCs have a big job, probably much bigger than they or their organisations have ever fully realised. This series of articles is my attempt to address all of these issues and more. It will provide the scope of the new role and identify some of the additional areas of knowledge and skills development necessary. More importantly it will put the role of the LC in the right context and that means creating the right culture and the right environment for learning to happen.

The ultimate goal of the LC, though, is value – real, bottom line value. In a commercial organisation this means profit or market capitalisation; in the

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NHS it means more patients treated per pound spent; in the public sector, better value services; for the police, better detection rates and lower crime figures. Value added is the common language and the only criterion of success.

So let us kick off the series with how to deal with this first, most important issue: how do LCs start to create the right environment for learning to flourish and value to be maximised? The simple answer is they make their organisations grow up and accept that organisational learning is a totally different ball game to running courses. They have to help their organisations have a much more intelligent, mature attitude to the use of resources allocated to learning activity.

THE LEARNING MATURITY SCALE

LCs need to know how mature their organisations are before they start, so the scale in Figure 1 (see below) should help you to plot this and pinpoint the implications this has for your own role. Let us explore each of the six stages on the scale in turn to build up a picture that is both multi-dimensional and dynamic.

Stage 1: Training administration only

Stage 1 represents a very immature organisation and, in my experience, many of these still exist. The CEO and board do not really have any interest in training and they would not even begin to understand the distinction between training and learning. All they

are interested in is making sure training does not cause any problems (that is, compliance). Such organisations usually allocate a percentage of wage bill to the training budget each year, or even just a fixed monetary amount, without any assessment of real needs.

Organisations at Stage 1 just employ training administrators to run a menu of generic courses (for example, standard supervisors’ modules). Occasionally, some managers ask for other one-off programmes (usually as a knee-jerk reaction to a problem that has just arisen, such as a serious accident or a tribunal) and the funds are then found. So training is either unfocused, just reactive or both. The only measures of training are the numbers of people attending courses (training days) and the main concern is minimising the average cost per head. This is because training is perceived as an overhead rather than as an investment.

However, it is worth noting that the learning maturity scale is a cumulative scale. All organisations should have efficient and effective training administration as a minimum. Certainly, you will never have a chance of reaching a higher stage if you cannot even send out joining instructions properly. Nevertheless, training administrators add little value if the training needs analysis (TNA) process is poor or omitted altogether.

Stage 1 is not a pretty sight. There is no role here for an LC, so let us quickly move on.

Stage 2: Professional trainers set standards

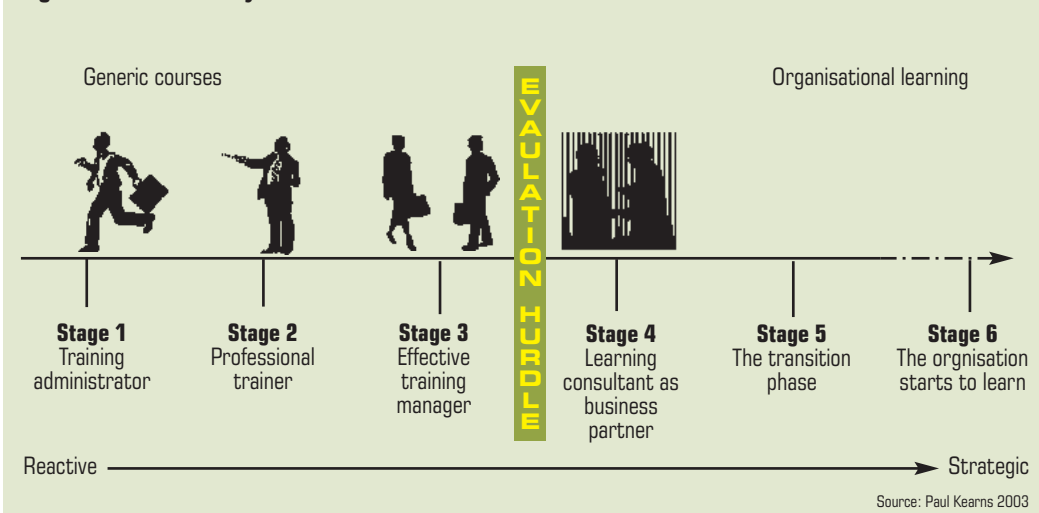
To get to Stage 2, the organisation has to make a conscious decision that it needs to be more professional. A restaurant chain might decide its customers expect a certain standard. So it trains its waiting staff accordingly. It employs ‘professionally qualified’ training staff. This would include setting training objectives and checking the suitability of nominations, but there would be no real systems in place. The trainers would ask questions about training needs (for example, do waiters need to know the ingredients of each item on the menu?) so they can design and deliver training programmes professionally.

Often, though, because the training budget is not controlled by the professionals, and there are no systems controlling training, line managers are allowed to bypass the training team if they choose. Consequently, there is very little consistency in training provision. Also, at this stage the board is still more concerned about minimum standards than it is about seeking to achieve a competitive advantage through training – a subtle but crucial distinction.

We can also start to consider the employee’s perspective now. He (or she) will regard their employer as more progressive because they have a more professional approach to his training compared to the last employer he (or she) had who ran a corner café. However, most of the training he (or she) experiences will be in the classroom on standard modules.

Of course, today, some of these modules would be delivered through an e-learning portal but the use of this sort of technology does not automatically mean the organisation is any more mature. Calling it ‘e-learning’ does not mean it understands the concept of ‘learning’. If it is, in effect, just

Figure 1: Where do you want to be on the scale?



Source: Paul Kearns 2003

a case of delivering existing classroom content online it would be better described as e-training. E-training is where the real motivation is to reduce training costs, not enhance learning opportunities.

Perhaps the main point to note about Stage 2, though, is that a 'professional approach' only gets the organisation about a third of the way along the scale. The trainers and developers are still reacting, primarily, to *perceived* training needs and they are in a role where they are regarded as 'servants to the line'. There is no sense of equality here. Only when they move on to Stage 3 will their role really start to change.

Stage 3: Trainers become more effective

Stage 1 organisations jump to the conclusion they need some training and are not too concerned exactly what sort of training that might be. So a standard module on customer service might be the order of the day.

Stage 2 organisations start to ask more questions such as: 'How do we make sure customer service training is of a high standard?'

Trainers in Stage 3 organisations ask very different questions altogether. For a start, they have a training system in place that says no training will be provided unless a proper TNA has been undertaken. However, this is only a more mature approach if they have already educated their organisations that this is the way training should be done. Line managers will then expect it because they have started to value their trainers' expertise rather than perceive them as asking too many awkward questions. Maturity is about managers and trainers working in harmony, not one side putting the other under duress.

Now, what starts to happen when a proper TNA is carried out is that *real* training needs are identified. The effective training manager reveals, through his (or her) analysis, that some parts of the organisation already give great customer service and decides he does not need to give training in this subject. He also finds that some of the customer service problems start right back in the warehouse where Despatch is sending out damaged products. Then he focuses some of his energy on resolving some of these underlying problems. This calls for a bespoke training solution and the warehouse manager starts to understand what business-focused training looks like.

Word of this is fed back to senior managers and it would be nice to say they all suddenly realise what training has to offer – if only life were that simple. Don't forget, Stage 3 organisations are still relatively immature; they have a long way to go. Some senior managers actually perceive this as the training team trying to encroach onto their managerial territory. They will need more convincing arguments to make them buy into a new style of training. To really convince them the whole organisation has to get over the evaluation hurdle.

The evaluation hurdle

This subject is big enough in its own right to warrant a whole article (Part 5). For now, though, let's just say that evaluation is all about expressing the real value of training and development, using ROI if necessary, to gain the commitment of everyone in the organisation – managers and employees alike. Getting over this hurdle is *not* about collecting lots of data; it is about educating everyone that effective training is about constant feedback. Did the training work?

CASE STUDY: Training starts to climb the evaluation hurdle at HM Customs and Excise

After attending one of our workshops in 1998 a training team at HM Customs and Excise was told by its local VAT Collector (the most senior manager in a district) to provide a 'customer care' course to deal with the large number of complaints coming from small businesses about their VAT inspections. Any training team operating at Stage 2 would have designed such a programme without asking too many questions.

Our evaluation methodology taught the team not to accept 'training needs' identified by its boss at face value, without collecting some hard evidence to support the analysis. Quick research failed to unearth any significant number of complaints. In fact, it appeared the collector was reacting to very nebulous, anecdotal information.

The training team stood its ground and offered to do some analysis on relations between VAT inspectors and their customers. This later resulted in a programme where measurable success criteria were designed in. The reaction of the collector was very positive and enhanced the reputation of the training team. It had entered Stage 3 and was already educating its managers about surmounting the evaluation hurdle.

If not, why not? What can we learn from that experience? It is evaluation that starts to move the organisation from a narrow and blinkered view of 'training' to a concept of 'learning'. This represents the biggest shift in organisational maturity on this scale. It requires no less than a complete breakthrough in thinking.

It is a very salutary lesson for all ambitious LCs that they cannot get their organisations to this level of maturity until they have cracked the evaluation code and we all know that every trainer struggles with the subject of evaluation. This is why it is a key part of this series. When you really understand the subject of evaluation you will be ready to move on to Stage 4.

When you really understand the subject of evaluation you will be ready to move on

Stage 4: LC acts as a business partner

The shift between Stages 3 and 4 is huge and will take a considerable amount of time. It also necessitates an evaluation system that deals with the Holy Grail of level 4 – organisational impact. In practice, this means the customer service training is now really well designed. Not only does it focus on the parts of the business for which it is really needed but also measures of customer satisfaction have already been collected as part of the re-vamped TNA process. Furthermore, this has been converted into potential lost sales and an ROI figure produced.¹ This shows an attractive potential return of 165 per cent in a clear and simple language the board understands.

Of course, none of this can happen by chance. The LC needs to be an expert on evaluation and know when to use ROI. In addition, he (or she) has already earned his spurs as a business partner by demonstrating he understands the business as well as any line manager. That is why senior managers are happy to discuss real business measures with them. Stage 4 is starting to be quite a mature organisation from a learning perspective.

In a Stage 4 organisation, managers do not expect to be offered standard, generic modules anymore. They like bespoke solutions because they have experienced the results (revealed through evaluation) and they talk about 'learning opportunities', not courses. In fact, some of them are running regular team briefing meetings, facilitated by someone from the learning team, where they discuss how to improve the way they work and the LC picks up on any areas requiring further support. Some of these will be delivered through the re-designed, just-in-time, e-learning portal. ➤

- However, everything is very structured and happens systematically. It is also very focused on the 'here and now', operational tasks and measures. This focus will gradually start to shift as the organisation continues to mature and enters into the transitional phase – Stage 5.

Stage 5: Transition phase

The concept of learning is now well established and the use of feedback loops really does start to drill down into some serious organisational issues. There is a noticeable shift from single loop to double loop (this will be covered further in Part 10, which will appear in the October 2004 issue of *Training Journal*). Learning starts to cut across departments and functions. The silo organisation has started to flex to allow this to happen.

So, for example, if customer service is deteriorating is it because the products are defective or after-sales service is not resolving them quickly and efficiently? The LC has already had some involvement in this issue because he (or she) already operates cross-functionally. His new process analysis skills have enabled him to pinpoint where most of the problems lie. Some of these problems arise out of a conflict between what the product developers have produced, what the sales people offer and what the after-sales



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people can deliver. This can only be resolved by the three teams working together to reach a satisfactory solution.

The same type of problem is obviously more prevalent in Stage 1 organisations. However, as no effective analysis takes place in such organisations their answer is to send the teams on an awayday, team-building course. Stage 2 organisations just organise their awaydays more professionally. The LC, on the other hand, has managed to help the organisation reach Stage 5 maturity by establishing who the owner of the process is (for example, head of product development). He (or she) accepts he is ultimately accountable but realises he has the authority to knock heads together if necessary. The LC is operating at a higher level, with the power players.

Towards the end of this transition phase the organisation has learned that solving these problems is absolutely fundamental to the way the business operates, and it informs strategic thinking for the future design and development of the organisation.

Reference

1. See Paul Kearns' article, 'The purpose of training: an assessment' *Training Journal*, July 2002 (pp. 12-16) for more information on ROI.

Action points for the LC

- Assess current perceptions to gauge where your own organisation is on the learning maturity scale.
- Find those who want to help develop maturity, both inside and outside the present training team.
- Make sure a robust TNA process is in place and use it to identify inappropriate training.
- Get hold of some key business measures and ask yourself whether your training is directly focused on improving them

Stage 6: Organisational learning

How the LC aims to help the organisation achieve the highest stage of maturity, Stage 6, is another specific subject big enough to warrant a whole article – Part 12, December 2004. But for now, we will describe what this level of maturity feels like. At this stage learning that adds value is happening continuously, quite naturally and almost unconsciously. A high level understanding of the concept of KM means a knowledge-sharing environment exists (and has been created right back during the organisation design and recruitment phase). Employees are truly regarded as a pool of intellectual capital with their innovative ideas being welcomed as a means of releasing their full potential. Finally, the organisation has managed to achieve that elusive quality of having a 'not-seeking-to-blame' culture; an absolute prerequisite if the organisation really wants to describe itself as a learning organisation.

If the LC is to have any chance of helping the organisation get to Stage 6, though, he or she must be operating strategically – the subject of Part 2, which will appear next month •

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- Part 3 ~ March 2004:*
The attitude of LCs
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How LCs become proficient 'cyclists'
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How LCs can use evaluation intelligently
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