

Performance consulting:

The ideal tool for ensuring a project adds real value

Performance consulting isn't just for management consultants. It's for anyone who wants to make a lasting change in an organisation, including HR, L&D and OD professionals.

Here's a scenario familiar to HR, L&D or OD professionals. Someone – often a leader or manager – spots a problem. They say: 'We need training!' or 'We need a change management project!' and you start scoping, designing and delivering that. But nothing changes, except that now everyone is frustrated. You've wasted your time, and management has lost confidence in your abilities.

Most of us in the HR world know this

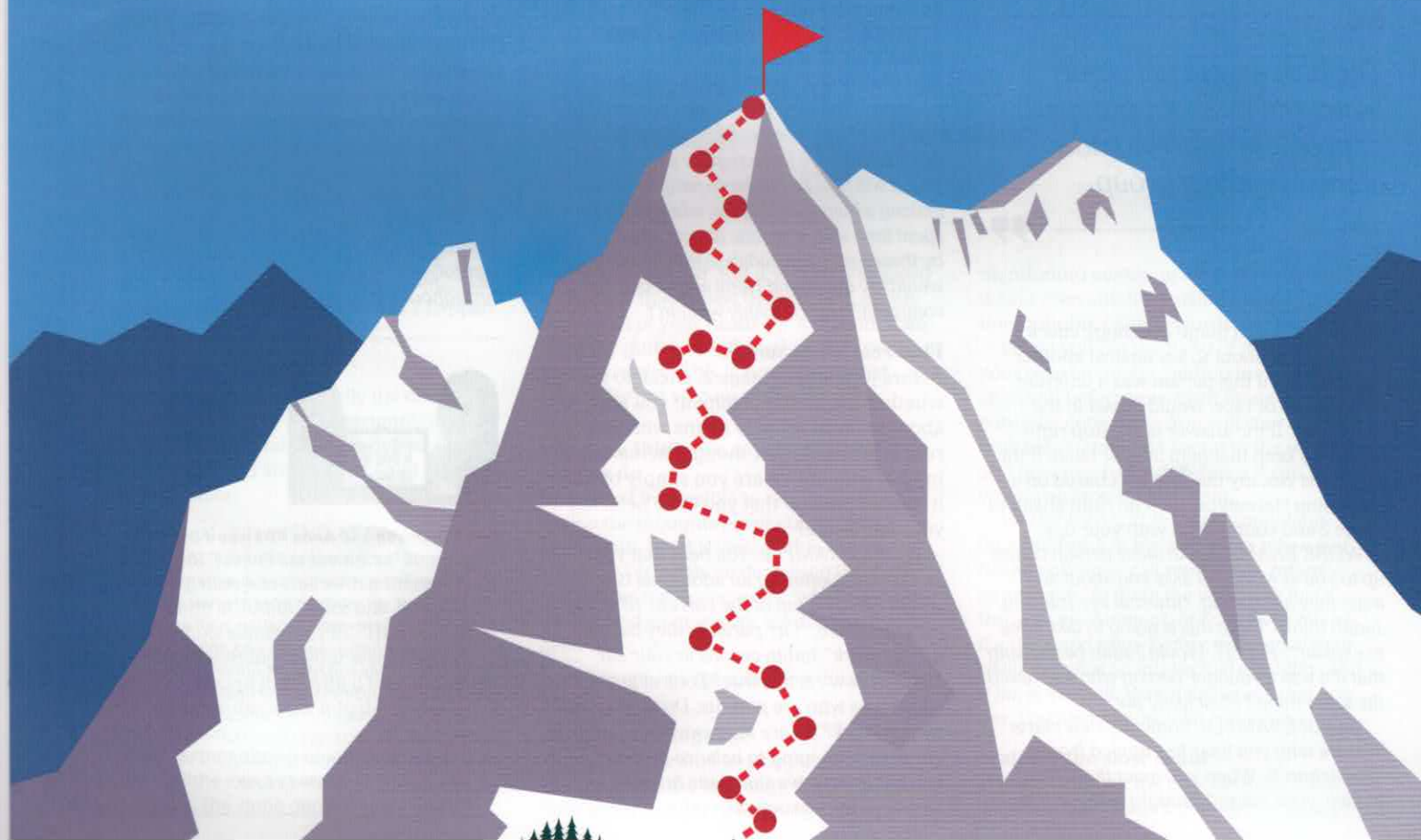
feeling. It's all the more soul-destroying because the initial intentions were good, but they did not translate into a good outcome.

Treat the source, not the symptoms

What went wrong? One common trend in these situations is that the initial thinking didn't address a business problem and tackle it strategically. Instead, there was a short-term fix that treated the symptoms rather than the source of the problem.

This is where a performance consulting approach will help. 'Performance consulting starts from the premise that there's a performance problem and we don't know why,' explains Paul Matthews, author of *Capability at work: How to solve the performance puzzle and the forthcoming Learning transfer at work*.

The performance consulting methodology requires exploring the problems by working collaboratively with others, proposing and



delivering solutions and measuring their success. The process is data-driven, making it less prone to scope creep and more popular with leaders who like to see the numbers behind a project.

Not just for consultants

There is another key benefit: performance consulting takes one from being an order taker to a proactive driver of change. L&D pros – often relegated to order-taker status – will particularly value this. ‘You’ll know you’re winning when people approach you with a performance problem they need help in solving rather than a request for a learning solution,’ Paul explains.

As Paul says, a successful performance consultancy project starts by exploring the problems. Authors Dana Gaines Robinson, James C. Robinson, Jack J. Phillips, Patricia Pulliam Phillips and Dick Handshaw agree, and outline the steps that follow on from this in the latest edition of their book, *Performance consulting: A strategic process to improve, measure, and sustain organizational results*.

Get started

The full performance consulting approach is designed to be applied to a whole organisation, but it is flexible and logical enough that it can be used on a smaller scale too. Here’s an introduction to the steps and how to apply them.

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Step 1: Identify opportunities

The first step must always be to take a step back. When people (busy managers in particular) spot a problem, they tend to start forming a solution straightaway. That solution isn’t always right. In fact, sometimes the problem isn’t right either.

So, step away and explore what is really going on, starting with asking some deep questions that focus on what should be happening, what is actually happening and why that is. Keep questions open and problem focused, not solution focused.

Aim to look forward, too. What are the business or team’s goals, and what is getting in the way of them? You may well reveal challenges that nobody had spotted before.

Step 2: Find the gaps

Now work out where the organisation or team wants to be. This includes looking at its goals and, also, how people would need to perform to reach them and the systems they would need.

You’re looking at the ideal scenario at this point: real blue-sky thinking. However, remember to go beyond the management team, to the people on the front line. What skills, support and systems do they need to reach those goals?

Now take another step back. What is the

current situation and why is it happening? Take stock by talking to the frontliners again, reviewing documents, carrying out surveys, observing how people work and looking at data. Above all, think broadly. ‘Be open minded and self-aware,’ Paul advises, ‘and be aware of any bias on the part of the problem holder.’

You can then compare your snapshot of things as they are with your ideal picture and spot where the differences are.

Step 3: Find the cause and possible solutions

A lot of information will have been gathered by this point, but it is still too soon to jump to solution finding. More digging is needed – this time into what is causing the current challenges. It is essential to talk to the people facing the problems. What gets in their way? The “five whys” questioning technique is a simple tool that gets to the heart of a problem, but there are plenty more.

When you are happy you have a full picture of what is going on and why, then it is time to explore solutions that will bring you closer to the ideal outcome identified earlier.

‘The most common error I see is people jumping to conclusions part-way through the process and assuming they’ve found the one solution,’ says Paul. ‘Stay open-minded throughout the process to ensure it’s not closed off before it has yielded its treasures.’

Step 4: Report results and agree solutions

As with all projects, you need to get buy-in from stakeholders before going ahead. This is the point when you can report your findings and work with stakeholders to agree the right ways forward. Stakeholders are likely to reveal new information – costs, previously unspotted obstacles, new goals – so it’s important to be flexible. But this is your opportunity to propose solutions, check with stakeholders that they will work in reality, and get the green light to get going.

Step 5: Plan how to measure success

Make sure you have planned how to measure success at this point. You have already worked out what success looks like: how will you measure the difference between the current situation and that ideal, and when will you check?

Step 6: Plan, design and deliver solutions

This is the part of performance consulting that most people have fun with. It is also the part many HR, L&D and OD professionals are likely to be most familiar with. Now, however, you can be confident that the solutions you’re building and delivering are designed with the organisation and its goals in mind. It will also be very clear what success will look like, and that managers will already be on board with your plans.

Step 7: Collect, analyse and report

Part of what makes the performance consulting approach so successful is that it is data-driven. Instead of pulling ideas out of thin air, plans and work are based on actual information about the business and its needs. That makes it essential to measure the baseline and the outcome, and to use this information to inform stakeholders.

YOUR PERFORMANCE CONSULTING TOOLKIT

The performance consulting approach is data driven, so you will need tools to help you gather, analyse and report on that data.

There are plenty online; take a look at the resources that accompany the performance consulting book mentioned above (available at www.bkconnection.com/pc) and the articles at mindtools.com as a starter.

Also check out Paul Matthews’ website, www.peoplealchemy.co.uk, for free guides and tips on L&D, management and organisational change.

The way success is measured will depend on the size and nature of the project. Large projects will call for return on investment reporting; smaller ones may call for details of the impact on staff or the ways in which they’re showing new behaviour.

Step 8: Close up

As you reach the end of the project, it is time to consider how to report its impact and what the next steps are. It’s best to involve stakeholders here; not only will this focus their attention on the changes made, it also helps them consider what needs to happen to make the change sustainable.

Relationships matter

The key to a successful performance consulting process is good relationships with stakeholders and colleagues. One step you can take towards the performance consultancy approach right now is to start building those relationships and becoming more aware of people’s needs.

If you struggle to get people on board, focus on their needs. ‘Many people seek change when they see an advantage in it for themselves,’ says Paul. ‘This is the key to selling performance consultancy and change.’

When you combine good relationships with insight, data and a desire for change, you are in a strong position to make a huge difference. **HR**



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