

# From Trainer To Consultant In 5 (*Not So Easy!*) Steps

By Marilyn Laihen

Practitioners of Organization Development (OD) have long espoused a "systems" approach to change management in the workplace. However, in Canada, the field of OD developed through the 70's and into the 80's as essentially a training enterprise.

Its roots are deeply embedded in the Human Relations Movement, which reached its peak in the late 60s, and the field of Human Resource Management subsequent to World War II. Human Resource Management produced an abundance of research in employee motivation and satisfaction (Herzberg, 1959; Lewin, 1947; Likert, 1961; Maslow, 1968; Mayo, 1945; McGregor, 1960) which provided the psychological foundations for OD.

From an early focus on interpersonal skills and awareness, largely attained through "laboratory" experiences in a retreat environment, OD evolved into on- and off-site training in such areas as communications; conflict management; group problem solving, decision making and goal setting; team building; and leadership or management skill development.

The purpose of OD during the 70s was to train personnel within organizational units (i.e., teams, departments, or the whole organization). However, its practitioners recognized that improved interpersonal functioning may at best be frustrating and at worst counterproductive if the organization in which new skills are practiced is not receptive to their use. The trainer's primary focus on skill development and team building, although useful in improving communication and problem solving procedures, has left the basic design of the organizational system, with its original principles of scientific management (Taylor, 1947) and bureaucratic theory (Weber, 1947), virtually intact. Employees who have learned to value a collaborative working environment are consistently confronted with the political/bureaucratic reality of most organizations which precludes a philosophy of interdependence and mutuality.

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not only able to provide such opportunities, but also to assess the impact of this learning on day-to-day operations, will be a major determinant of success in the 21st century.

As we begin to conceptualize "change" and "development" in terms of organizational learning, a new role for the trainer comes into focus. Now the

It has become evident, especially in the last decade, that in order for personal and interpersonal change to be genuinely supported in an organizational setting, the structure of the system and its functioning, as well as the role of the change agent, must be dramatically reenvisioned.

## From Trainer To Consultant: The Concept And The Rationale

In the current context of world competition and recession, the term "value added" has taken on new meaning. Learning within organizations needs to have a direct and tangible impact on employee motivation and productivity. Whether it be through classroom training and on-the-job coaching at the individual level, through work-team development at the group level, or through conceptualizing the entire organization as a learning system, organizations can no longer afford to treat learning opportunities as a reward for "good behavior" on the job.

In the past, this approach has relegated in-service training to the position of a fringe benefit for employees—and one which is often the first to disappear if budgets are reduced. Additionally, there has been little or no intentional bridging between the skills and knowledge accrued through training efforts and application of that learning on the job. Mistakes are repeated or avoided, with minimal effort to reflect on and learn from the experience, to ensure a more competent future response.

Today, the concept of developing *organizational learning capacity* is becoming recognized as a key factor in maintaining the "only sustainable competitive advantage" (Senge, 1990, p. 4). Survival, whether in the not-for-profit or private sectors, is increasingly being viewed as directly related to an organization's ability to encourage, enhance and utilize learning at all levels. The extent to which an organization is

trainer's task is expanded from skill development in specific, prescribed areas, to helping the organization and its members learn how to learn.

## A Role Comparison

This article explores the evolution from trainer to organization consultant—incorporating the training function as an important, but not exclusive part of the role. The table on page 34 provides a framework for the

comparison by outlining the similarities and differences in the two roles.

## The Trainer As Consultant

Recognizing both the similarities and the differences between the training and consulting roles, the remainder of this article outlines a phase by phase developmental process from the former to the latter. It uses Paul Woolner's (1991) model of the "learning organization" as a conceptual map.

### Phase 1: Informal Learning—No Trainer Intervention

This stage in organizational life precedes the professional training intervention. Learning occurs through trial and error, as employees attempt to adapt to the organization's demands. Although a great deal of learning may take place in this experiential context, it is neither designed nor evaluated.

### Phase 2: Training As Professional Development

Eventually, organizational members became aware that they are unable to meet current demands with their existing performance capacity. At this point, they may pursue programs outside the organization which they believe will provide the needed skills and knowledge.

The assumption is that the learning acquired through these (mainly short-term) experiences will be brought back and applied in a work setting. However, there is generally no planned link between individual learning and the organizational context, and therefore often no direct support for the learner to use the newly-acquired skills or understanding. Additionally, the trainer in these programs tends to be external to the organization, and therefore is not available as a resource beyond the duration of the training event.

The result, at best, is that the learning atrophies. At worst, the learner becomes frustrated and demoralized at not being able to apply new knowledge, and the "perk" which may have been intended by sending the employee for training becomes a hindrance

to performing effectively. Thus, the impact on the organization of such interventions is at best low, and at worst, potentially detrimental.

However, Woolner (1991, p. 6) notes that:

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*The purchase of "off-the-shelf" external programs offers a com/on level in its familiarity and confidence in the expert. The value of the purchase of learning as a consumable is that the organization can gain experience in attempting to address organizational issues through an educative strategy.*

If such programs are viewed as professional development experiences, and if the employee who has been trained can be encouraged to at least share his or her new ideas with workplace colleagues, the training effort may have some minimal organizational impact.

### Phase 3: On-Site Training

"In-house" training programs, usually provided by the Human Resources department or function, are common to most organizations today. This approach to learning results from a concern about cost-effectiveness, as well as the need to offer more integrated training which is responsive to various sectors of the organization. Such programs may address specific learning needs for technical, interpersonal, or managerial skills, and are either presented by internal personnel or purchased along with the services of an external trainer.

Although there are "economy of scale" advantages in this approach, (e.g., a number of people in the organization can participate concurrently), "the links between developmental and educational activities and the organization's strategy may not be clearly or strongly made" (Woolner, 1991, p. 7).

The tendency among organizational members is to view these programs as a "flavor of the month" approach to learning. Whatever is currently popular in the field is designed as a training experience, offered in a program calendar, and attended by employees who have expressed an interest in learning more about that particular topic (or whose managers have promoted the idea).

The main advantage of this approach over off-site training is that often the participants in these programs come from the same sector of the organization. Thus, not only do they benefit from the team building by-product of sharing a learning experience, but they also gain the advantage of peer (and sometimes supervisory) support in implementing their learning on the job.

There is usually some attempt made in these programs to assist with transfer of learning to the workplace through the use of job-related examples or cases and action planning components in the design. However, there is a realization, by both program designers and attendees, that these programs have

# SIMILARITIES

## TRAINER

## CONSULTANT

### 1. Preparation Phase

Explores the relationship with the client to ensure a "fit" (Should we be working together? Who else needs to be involved?)	Same
Identifies with client the presenting needs; encourages discussion of mutual expectations; clarifies roles, timelines, budget, evaluation process, etc.	Same

### 2. Data Collection and Diagnosis Phase

Conducts "needs assessments" to prepare for identifying training goals	Collects data to identify specific organizational issues which need attention
Analyzes data to extract recurrent themes; summarizes these findings	Same
Presents data to clients to support training proposal	Presents data to clients to help them identify relative strengths, weaknesses, and issues

# DIFFERENCES

## TRAINER

## CONSULTANT

### 3. Planning Phase

Identifies training goals and prepares a design proposal for the training session (may or may not ask for input from the client and/or program participants)	Explores with the client alternative methods/approaches for dealing with issues identified  Plans with the client for implementation (roles, check-points, accountability, evaluation)
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### 4. Implementation Phase

Conducts a discrete event or series of events which constitute the training intervention	Plans are carried out, usually over an extended period of time.
Role of the trainer is that of "expert" (in either process, content, or both)	Role of the consultant is that of process guide/coach to organization members—they take the lead in implementation
Time-span is limited and predictable	Time-span is estimated, but revised as necessary (can take 3-5 years for full implementation)

### 5. Evaluation Phase

Evaluation tends to take the form of a "smile sheet" at the end of the training event	Evaluation is on-going (may be conducted at the end of each phase of the process)
Little or no responsibility for follow-up is left with the organization members (participants or managers)	Organization members are expected to embed follow-up activities into the implementation process.

### 6. Termination Phase

The training process is terminated with the event itself, or sometimes followed-up by the consultant with a "three month later" questionnaire/interview re: applicability of the learning to participants' jobs.	At the end of each phase of the contract, the consultant and client discuss whether to recycle, terminate, or extend the contract.
Accountability for the success of the training event lies with the trainer.	Ownership for the project is firmly invested in the client.
minimal impact on actually changing organizational	practices.

#### Phase 4: Training In Service Of Organizational Objectives

In this phase, strong links are established between the organization's strategic and operational directions and the educational interventions which will support them.

The task here involves the establishment of specific performance criteria based on identified organizational goals. These criteria are not only related to the individual's job requirements, but are also connected to those in other sectors of the organization. By introducing a more "total system" component to the educational approach, the potential is created for lasting change in organizational practices, values, and culture.

The role of the change agent in this environment is dramatically different from that of the trainer in Phase 1. It includes helping the organization to research specific developmental needs of all personnel, and designing educational interventions to respond directly to those needs. Programs are created to incorporate the underlying values of the organization. Thus, training is directly linked to organizational performance objectives.

Lee and Roadman (1991, p. 4) describe this approach as "a systematic process for determining goals, identifying discrepancies between goals and outcomes, and establishing priorities for action."

According to Lee and Roadman, the eventual training program objectives may result from some or all of the following:

- *Normative needs*—which offer a comparison by industry standards, and may include input from external clients;
- *Felt needs*—based on the learners' "need to know;"
- *Expressed or demand needs*—the manager's determination of development needs based on individual employee performance. This data may be surfaced through a task analysis, which is a detailed examination of job-related tasks to be performed, and which is negotiated with the employee to be trained. Sometimes the establishment of an employee "learning contract" is involved;
- *Comparative needs*—based on data from divisions and relating specifically to their interface within the organization;
- *Anticipated or future needs*—resulting from projections of strategic organizational directions.

The training interventions guided by these data have further impact when there is intentional

continuity from program to program, and when participants at all levels of the organization are encouraged or required to follow this flow as part of their promotional progress. In this type of learning environment, managers are motivated to fully encourage the application of new skills, knowledge, and cultural norms among employees within their own units, and are supported in this process by the trainer/consultant. Finally, evaluating the outcomes of training, or the impact of training on the job, is an integral component of the educational process. This may be accomplished through a combination of questionnaires, individual or group interviews, supervisory observations and feedback, and client responses.

According to Joan Goldsmith (1979) such integration of educative and organizational strategies ensures training which is based directly on the cultural and social realities of the business and its clients. In addition, it ultimately aids employees in best serving the needs of the organization as well as in meeting their own developmental requirements.

#### Phase 5: Integrating Learning With Organization Development—The Trainer As Consultant

The "Phase 5" organization has taken learning out of the classroom, and incorporated it into the everyday realities of working life.

Learning in this phase becomes the responsibility of line management and work teams, where learning activities are focused specifically on task related projects. The supervisor accepts a coaching/teaching role as an integral part of his or her mandate, while peer multi-skilling and cross-training become the teaching/learning mandate of work teams. If these educational efforts are directly related to a flattening of the bureaucratic hierarchy, reward systems may change from pay for role performance to pay for knowledge and skill acquisition. Rewards may also be tied to empowering and developing in others the skills to take on greater responsibilities in the workplace. Finally, a focus on customer/client responsive-ness is key to organizational productivity.

Recently this approach to organizational learning has been termed "Continuous Quality Improvement" or "Total Quality Management" (Atkinson, 1991; Humphrey, 1990; Jalonski, 1991; Solway, 1991).

Although it may still include training events, the role for the change agent now becomes that of consultant to the organization as a whole. The consultant's tasks may include preparing the organization for and supporting it in implementing any or all of the following:

- the development of a vision, philosophy, mission statement and core set of values, which provide a framework for individual, team and organizational change
- the planning of strategic organizational goals based on the above which drive operational directions (This may involve a survey of organizational strengths and weaknesses through such approaches as employee opinion polls,

client feedback, leadership profiles and skills identification, and employee focus group interviews.)

- an assessment of learning needs and the development of educational interventions to respond to these (may be offered by line personnel as well as professional trainers), resulting in a dissemination of core competencies to agreed-upon standards through all levels of the organization
- team development throughout the organization, to provide the structural framework which supports continuous improvement efforts through group problem solving
- all levels of the organization utilizing a "performance management cycle" which includes:
  - negotiating performance expectations and setting behavioral objectives, preferably every six months
  - discussing and continually updating a performance development plan directly related to the objectives set
  - providing appropriate educational support in the form of coaching, classroom courses, external programs, cross-training, etc.
  - consistently monitoring progress of the employee or team, and providing on-going feedback as well as more formalized performance appraisals for review and continued goal setting
- coaching of managerial personnel in the skills needed to implement all of the above (In order to enable the consultant to provide this coaching role, it is critical to ensure that the function is directly accountable to the senior manager or management team.)

The latter is the key issue in moving from a training role to that of organization consultant. It is therefore unlikely that this will occur successfully, unless the function is valued enough by the organization to ensure appropriate accountability. Alternatively, the function may be placed outside the organization through an external consultant. However the role is enacted, it will be crucial to providing the objective and skilled support needed to develop high-performing organizations for the 21st century.

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