# The Seven (actually nine) Deadly Sins
## of New Performance Consultants

The transition from trainer or OD specialist to performance consultant involves a lot of "lessons learned." Here's a look at what a number of veteran HPI professionals have learned from their early experience and the most common mistakes they see being made by new performance consultants.

T here's a story—perhaps apocryphal—about the late Sam Walton, founder of Wal-Mart and how he had managed to achieve so much professionally. A student is supposed to have asked "Mister Sam" how he got to be so rich and successful. "Easy," Walton said. "Lots of smart decisions." The student then asked how he managed to make so many smart decisions, to which Walton replied, "Easy. Lots of wisdom." The student then inquired how Walton had gotten to be so smart, to which Walton responded, "Easy. Lots of dumb decisions!"

That tale illustrates a key point for almost any successful professional: To be successful requires continual learning, and much of that learning occurs through the errors we make. We'd all like to avoid making mistakes, but that's impossible when starting out. In fact, screw-ups can be key learning opportunities when we evaluate them intelligently and learn the appropriate lessons from them. Yet, though we preach the value of learning organizations and importance of lifelong learning, we're

By Joe Willmore

sometimes unwilling to admit our own capacity to make mistakes and fail to recognize the learning opportunities.

Looking back on my own journey in the field of human performance improvement—and the many learning opportunities—I decided to query a host of trusted peers and performance notables for insights and the lessons learned from their own journeys. I asked two questions: What mistakes did you make starting out that you learned from? What are the most common mistakes you see new performance consultants making?

Let me share the nine common (and often deadly) sins of new performance consultants.

### Deadly Sin 1: The Lone Ranger Syndrome.
The tendency for many trainers and OD professionals is to take an assignment and run with it. That makes sense because trainers and ODers typically own that part of the work and are considered specialists in designing or delivering their particular interventions. But human performance improvement, or HPI, requires partnership with the client and other stakeholders because, typically, all aspects of the performance project will fall outside the authority and resources of the performance consultant. Mary Broad, co-author of *Transfer of Training,* says that a consistent shortcoming she has seen is the failure to partner. "One of the most critical competencies of the performance consultant, internal or external, is the ability to form constructive partnerships with key stakeholders in the organization," she says. When new performance consultants try to go it alone, they usually fail—especially with complex challenges.

Tom LaBonte, who wrote *Building a New Performance Vision* and is a facilitator for ASTD's HPI program **http://www1.astd.org/HPI.Community**, has noticed that even when new performance consultants do partner, they tend to aim too low. Says LaBonte, "One of the most common and critical mistakes is either partnering with someone too low in the organization or partnering with someone who isn't the real client—such as managers whom the new performance consultant already has a relationship with. Those people often aren't the ultimate decision makers, so the performance consultant spins his or her wheels on resources, decisions, and getting access to the workplace."

Most performance projects involve a number of causes and interventions that cross boundaries and re-

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## ally every definition of HPI

quire buy-in from several teams or units, so partnering with the right players is important in order to get access and resources. Good performance consultants aren't lone rangers. They become team players who involve others and identify key stakeholders and supporters. They look for champions and decision makers because they realize that the support of such people is critical for most performance projects.

### Deadly Sin 2: A rush to judgment.
Clients are usually in a hurry and tend to have unreasonable expectations. That's a challenge for everyone regardless of experience level, but especially for newly minted performance consultants. Yes, we need to be responsive and act as quickly as we can, recognizing that time is a precious commodity. But as former Coast Guard performance consultant Jeff Parks points out, "Newbies will frequently try to get to the end too quickly. The process isn't always fast, and there is some churn; clients usually have to stew for a while. The performance problem didn't get that screwed up overnight, so it won't be solved overnight."

The tendency to rush—or "premature intervention," as one consultant calls it—leads to actions before the performance consultant really knows what the problem is. We all recognize the time pressures in all organizations, but rushing on the front end is a prescription for disaster. Failing to clearly identify the root cause of the problem means that we end up selecting an action that doesn't really solve the problem. George Piskurich, editor of *HPI Essentials,* notes, "I especially see new people stopping at a level or two above [the root cause] and reporting back to clients causes that…won't close the gap."

We never get all of the information we want or like, but practically every definition of HPI or human performance technology uses such words as *rigorous* and *systematic*. Good performance consultants generate improved performance, and that's possible only when we address root causes and key performance deficiencies

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instead of slapping bandages on annoyances. Can good analysis be done quickly? Of course it can. Allison Rossett has written in great detail about ways to speed up the front-end piece of a project, but fast analysis doesn't have to mean incomplete or inaccurate analysis.

### Deadly Sin 3: The Tower of Babel.
Too many inexperienced, and even veteran, performance consultants use jargon that doesn't connect with clients or their work environments. Most clients have no idea what HPT (human performance technology) stands for. We put out job titles such as performance consultant, while ignoring that we might be part of an organization where the term *consultant* is pejorative. We talk about *interventions* rather than *solutions.* One internal practitioner new to HPI remarked that he was starting to learn the hard way that "instead of asking my clients to tell me about their business objectives, I should ask them, Why is this important?"

We also insist on selling HPI to clients. We become so wrapped up in explaining the model or justifying the approach that we lose the client. Faced with Power-Point slides with boxes, arrows, and terminology, most clients roll their eyes. Dennis Mankin, another ASTD HPI facilitator, has an interesting take on this problem. He recommends that instead of trying to convince clients that a performance-focused approach is necessary, "Respond to a client's request in an HPI way and let the results speak for themselves." That mindset lets the performance consultant focus more on doing the work—generating the analysis, identifying performance gaps—and less on selling performance. Effective performance consultants make sure that the performance model, language, and process don't distract from the focus on the performance issues and business priorities that initially mattered to the client.

### Deadly Sin 4: Just-in-time = too late.
Too many new performance consultants take a reactive stance waiting for clients to contact them, prob-

lems in hand. They wait for someone to knock on their door. In that reactive mode, they forget that most clients already have a preferred solution in mind (usually training) by the time they contact the performance consultant. That's a difficult situation to deal with and means a missed opportunity to be strategic and go after performance problems that really matter to the organization. Because most HRD professionals aren't encouraged to seek out problems and approach executives about their strategic initiatives, new habits prove hard to acquire once they don performance consulting hats. A good performance consultant is a strategic partner and trusted advisor. That's more than a nice phrase; it means that the consultant knows the client's business. It requires the consultant to identify emerging issues and be absolutely clear about what matters most to the organization strategically, so that the consultant can be proactive and anticipate problems that will emerge in pursuit of that strategy. As a rule, the clearer performance consultants are about business goals and organizational strategy, the easier it is to be proactive and anticipate performance gaps.

### Deadly Sin 5: One size fits all.
Talk to HPI thought leaders—be it Geary Rummler, Jim Fuller, Dana Robinson, or Judith Hale—and they have a model they advocate. Every veteran performance consultant probably has a model for front-end analysis, another for evaluation, another for intervention selection, and so on. But a common challenge for many performance newcomers is the tendency to stick to a model rigidly rather than use it as a starting point they can then segue from—much like a jazz performer uses a melody to launch riffs. Recall the well-known comment, "When you have a hammer, everything looks like a nail." That comment resonated with me after I spoke with a new internal performance consultant about the challenges he faces and the learning he's undergoing. He said, "I've got a

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hammer and now everything's a nail. My exuberance and passion that this is the right stuff are overcoming the reality. In some cases, simplicity is needed."

Simplicity calls for a willingness to use models as guides and starting points with the work, and the ability to be flexible and recognize that sometimes (well, usually) a model can't encompass all of the factors encountered, or the performance issues don't map exactly to the model. Models guide the thinking and analysis; they don't need to be a rigid set of blinders.

**Deadly Sin 6:** No one's listening. We, as performance professionals, tend to forget who we're dealing with. We often become so excited about the possibilities around performance issues that we fail to see that the rest of the organization doesn't share our excitement. The executives may talk about the need to be more accountable and focus on results, but that doesn't mean they share our enthusiasm for HPI. Piskurich points out that "new practitioners expect that when they talk, the client will listen." We forget that we might not be the most credible source in the organization or that mouthing support for performance doesn't ensure sustained support for projects or our recommendations. We develop new performance consulting structures with elaborate engagement processes in response to corporate demands for results, only to see clients continue to demand training or avoid new HPI services. Jim Fuller, another facilitator for the ASTD HPI Certificate program, quips, "Build it, and they will flee." Just because we set up an HPI infrastructure or take an HPI approach doesn't mean clients will embrace it or trust our judgment. It's necessary to build credibility.

Good performance consultants have learned to build credibility usually through results and the right data. Strong partnerships also mean that a savvy performance consultant can pull in someone who's credible with the client. Ultimately, veterans recognize that sometimes the client just isn't prepared to listen or accept what you have to say. Serenity is required—to recognize that you've done all you can and maybe it's time to move on to the next project.

**Deadly Sin 7:** Prove them wrong. We've all encountered clients who approach us with their minds made up about what action they want us to take. Usually, it's a request for a specific type of training or teambuilding. As performance consultants,

that's a major change we need to make—to become more proactive and become a partner and an advisor. But when we start out in the performance arena, we often take the wrong tactic with clients and debate or even argue with them about solutions. That almost always fails and makes the client feel as if the rules have changed, and it frustrates the new performance consultant. One told me, "Managers used to come to me and ask for time-management training, and the conversation was all about the logistics. Now, I find myself butting heads with them, trying to explain that they're shortsighted and we'd just be wasting resources unless we get to the root cause. I feel like I'm alienating people."

Dana Robinson says, "Don't *tell* someone to HPI, *ask* them." Asking the right questions, starting at the level the client's at, and paraphrasing intent can move clients from their original position so they invite us to do a front-end analysis. That turns into a dialogue and exploration instead of a debate. Then the client is less likely to dig in his or her heels and insist on the original request. It also converts the consultant from an order-taker or adversary to an advisor or even partner in solving the performance issue.

**Deadly Sin 8:** Can't say no. A common tactic for many prospective performance technologists is to keep doing everything else they've previously done (all of the training, all of the facilitation, all of the OD interventions) and attempt to do HPI work at the same time. That leads to the lament that there isn't enough time to do serious front-end analysis or evaluation work or that the HPT roles are unrealistic. Moving to performance consultant not only involves a significant mind shift and approach to how we do our work, but also means saying no. Research from Dana Robinson and Jim Robinson shows that performance consultants spend less time delivering interventions and more time doing analysis, evaluation,

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and partnering. It isn't possible to succeed at performance consulting by continuing to do what you've always done and just adding some new work to the top of the pile. That's unrealistic and isn't really performance consulting. Performance consulting is the process we use to improve performance issues, not the kinds of interventions.

Additionally, the inability to say no demonstrates a failure to look at business goals. Good performance consultants understand that just because there's a performance gap doesn't mean the work is worth doing. If there isn't a strong tie-in to important organizational goals, then the performance consultant will get tied up doing a lot of small projects that clients appreciate but that will have a poor return-on-investment to the organization and the consultant. Yes, we all face political realities in which saying no isn't a viable option, and there may also be times we say yes because we want to build trust or gain entrée to another part of the organization to address more serious issues. But not saying no when no is called for can lead to work that contributes little to organizational priorities. The ability to say no is critical if you're going to be successful as a performance consultant, but it's less about being assertive and more about the real role of a performance consultant. If you follow the HPI process, you identify business goals and key performance drivers for those goals. That makes it relatively easy to identify requests with low ROI or no relevance to key organizational goals. The HPI process (combined with Dana Robinson's advice to "ask people to HPI") helps move clients from unreasonable demands to open possibilities.

## Deadly Sin 9: If it's measurable, then let's measure it.
A common evaluation challenge goes to what we actually choose to measure. One mistake that all types of professionals in our field (not just new performance consultants) fall into is to assume that just because something is measurable it's worth measuring. We see people tracking Website hits, training hours, number of outgoing calls, number of internal consulting projects, and percentage of training hours spent on particular projects. I've seen internal performance consulting operations measure average Likert scores on course evaluations and average time spent per year doing training. A lot of stuff gets measured that tells us little or nothing about the performance results. It makes sense to use existing metrics rather than develop new ones that might not be credible with the client, but it's important for performance consultants to focus on business goals and the actual accomplishments that drive those goals. The easiest way to avoid the "measure everything" trap is to be clear on business goals and think of evaluation at the beginning of the project. By doing both, you'll likely identify metrics that are relevant to the goal and meaningful.

If that list of HPI sins is humbling, remember that nearly all veteran performance consultants have committed more than their share. I have. Nearly everyone I talked with for this article admitted they'd learned many of these lessons the hard way. So, it's not that successful performance consultants don't make mistakes; they just don't repeat them. Now that you're forewarned, you can avoid them all together, but don't forget that a mistake is also a learning opportunity. **T**D

**Joe Willmore** *is a performance consultant with the Willmore Consulting Group near Washington D.C. and author of* Managing Virtual Teams*; willmore@juno.com.*

**"How to Give 'Em Performance When They Insist on Training" (May 2002 *T+D*) by Willmore, and "Demystifying Performance: A Roadmap" and "Demystifying Performance: Getting Started" by Dennis Gay and Tom LaBonte (May and July 2003 *T+D*).**