

The little book of
**Performance
Consulting**

The
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The little book of

Performance Consulting

By Andrew Jacobs

The
CharityLearning
Consortium

With thanks to

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Harri Candy, ELK Online

Nigel Harrison, Performance Consulting UK

Stacie Lloyd, Royal Voluntary Service

Kris Medlang, Shelter

Charles Jennings, 70:20:10 Institute

Edited by Susie Finch

*Tips from Andy Lancaster are taken with permission from his book **Driving Performance Through Learning**

Foreword

It's an unfortunate reality that learning and development (L&D) practitioners are often perceived as shopkeepers. To my mind, we need to become more like doctors. When someone approaches us with a problem, we should answer with helpful diagnostic questions which reveal the underlying needs – and then work out the best way to implement joint and strategic solutions.

The biggest challenge we face when working this way is that it's often easier to commission a quick training fix than it is to face up to, and understand, complex performance gaps. We need knowledge, skills and confidence to do this. That's where this little book can help, with challenges, snippets and advice to help you realise what performance consulting can be.

Nigel Harrison

Performance Consulting UK

Changing things
holds the same fear as
playing Jenga – what
happens if we take the
wrong block away?

The performance consulting challenge

What is performance consulting? In simple terms, it means working with different parts of an organisation to make them better at what they do, analysing challenges and supporting the right solutions.

When it's applied to learning and development, it's a long-term view. Yet L&D is usually considered the place to get a quick learning fix! Hence the challenge.

Learning is rarely considered strategically. It's seen as a solution to solve a problem, as a service that's delivered. This is compounded by our supply of delivery data (numbers of courses, attendees, completions).

A consulting approach is more strategic than this. It can help you get to the heart of a problem and optimise performance. In this little book, I'll show you how.



The learning team
live in the pocket of the
organisation – we work
this closely so we know
what's needed

Stacie Lloyd,
Royal Voluntary Service

Becoming engineers

We often operate as ‘shopkeepers’ in L&D. The organisation asks you to design, develop and deliver learning and we package it up. Performance consulting is different because you approach challenges as an engineer. That means:

- Listening to senior leaders to understand their aims, objectives and strategy
- Working with peers, analysing relationships, structures, channels and communications
- Collaborating with IT, finance and other functions to review systems, processes and ways of working
- Having a really clear view of how the culture of your organisation operates
- Ultimately, designing support that isn't solely skills-based

Tip: Let the problem lead the solution

Learning isn't always the answer, so analyse business challenges holistically. If you start by analysing learning needs you'll only ever provide learning.



The killer
question to ask is
'what's the cost
of doing nothing?'

Nigel Harrison,
Performance
Consulting UK

Five steps to performance consulting

Step one: Assess

Agree what's needed, when, and what the end result looks like.

Step two: Gather data

Use data to understand what's happening and the extent of the issue.

Step three: Make recommendations

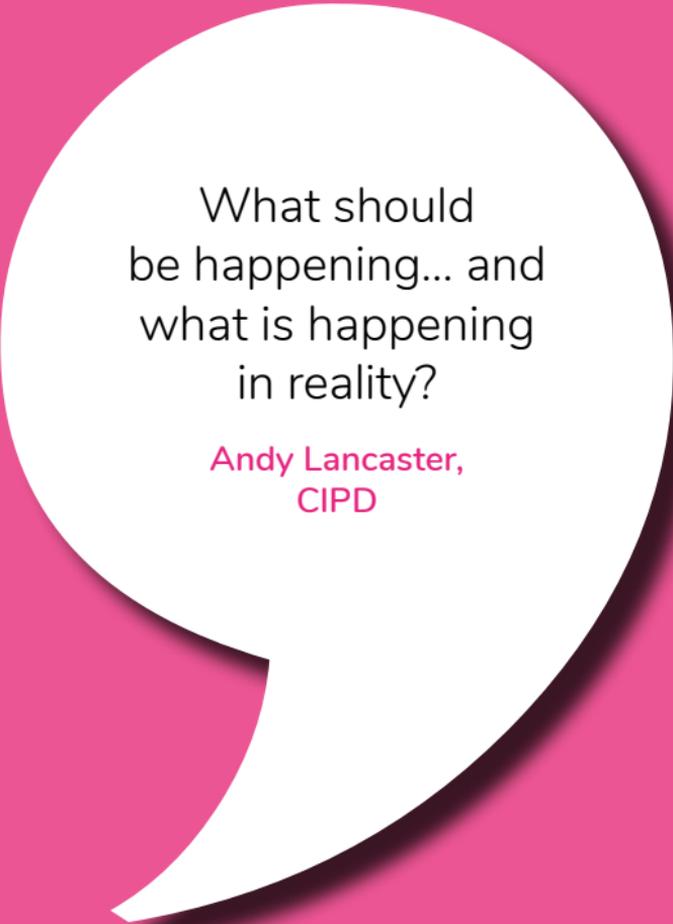
Explain what should happen, why, when and how.

Step four: Take action

Make things happen by negotiating and commissioning.

Step five: Evaluate

Measure what's happened and what's changed. Recommend what still needs to change and what will happen in the future.



What should
be happening... and
what is happening
in reality?

Andy Lancaster,
CIPD

Step one: Assess

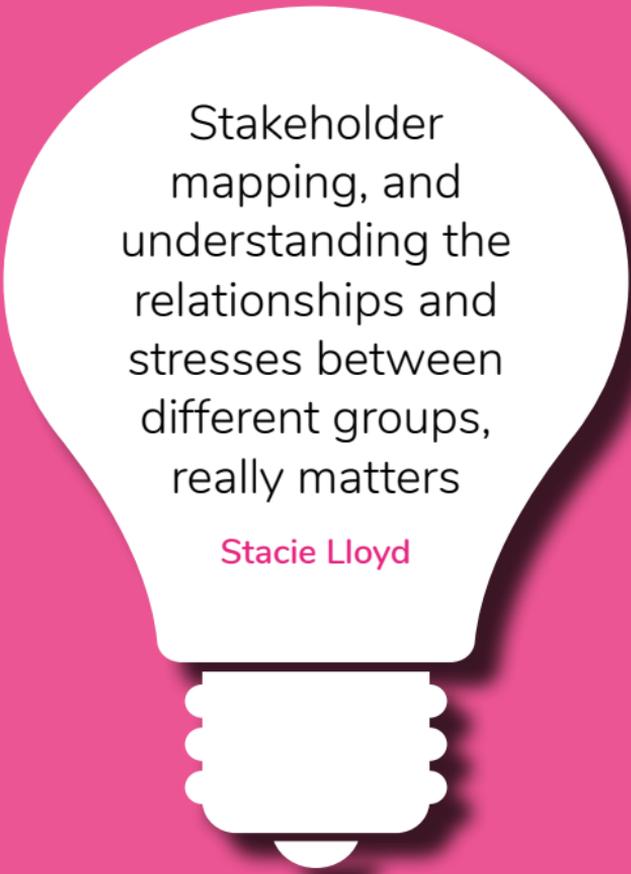
Workplace challenges are usually more complex than just a training issue. Adopting a performance consulting approach means assessing challenges first, then finding the right solution. The exercises here will help you do that.

Exercise: Define how you're working

Look at the last workplace issue you were asked to support. Then assess the challenge using the categories below:

- Strategy and aims
- Relationships and networks
- Systems and processes
- Skills and attitudes
- Culture and ways of working

Break the problem down into these categories. How much of the issue was related to each of the categories above? This will help you look beyond just skills and training.



Stakeholder
mapping, and
understanding the
relationships and
stresses between
different groups,
really matters

Stacie Lloyd

Exercise:

Your destination

If you want to support performance over learning, you need to understand how the vision at the top of your organisation connects with people's day-to-day activities.

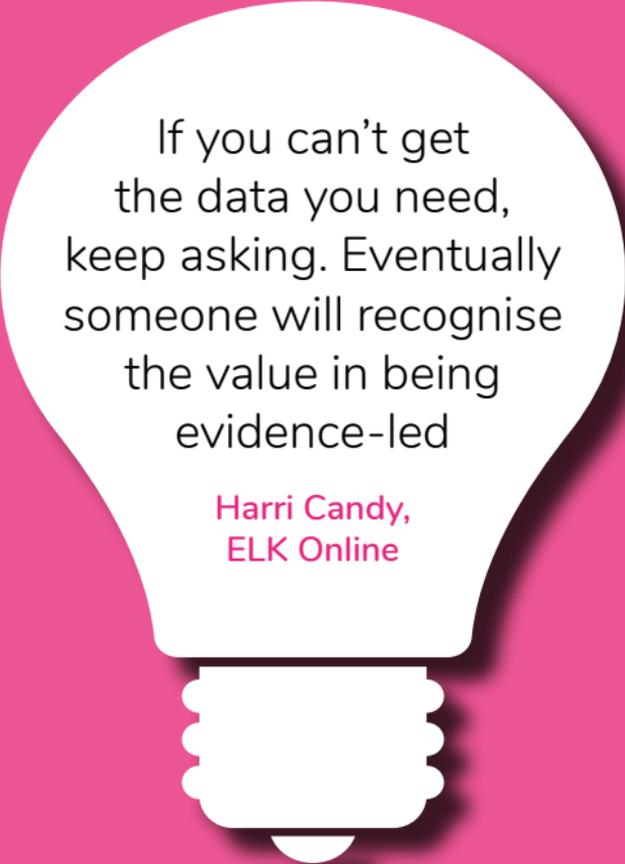
Break down your organisation's aims into:

- **Strategies:** Organisational plans and schedules
- **Tactics:** Divisional plans and ways of working
- **Operations:** Team plans and activities

Can you identify how the three tiers interconnect?

- Is any operational activity unrelated to the aims of the organisation?
- Are there business strategies and aims that L&D is not supporting?
- Are your L&D tactics helping to translate strategy into operational activity?

Look at your answers and reflect on what you and any L&D team can do differently.



If you can't get
the data you need,
keep asking. Eventually
someone will recognise
the value in being
evidence-led

Harri Candy,
ELK Online

Step two: Gather data

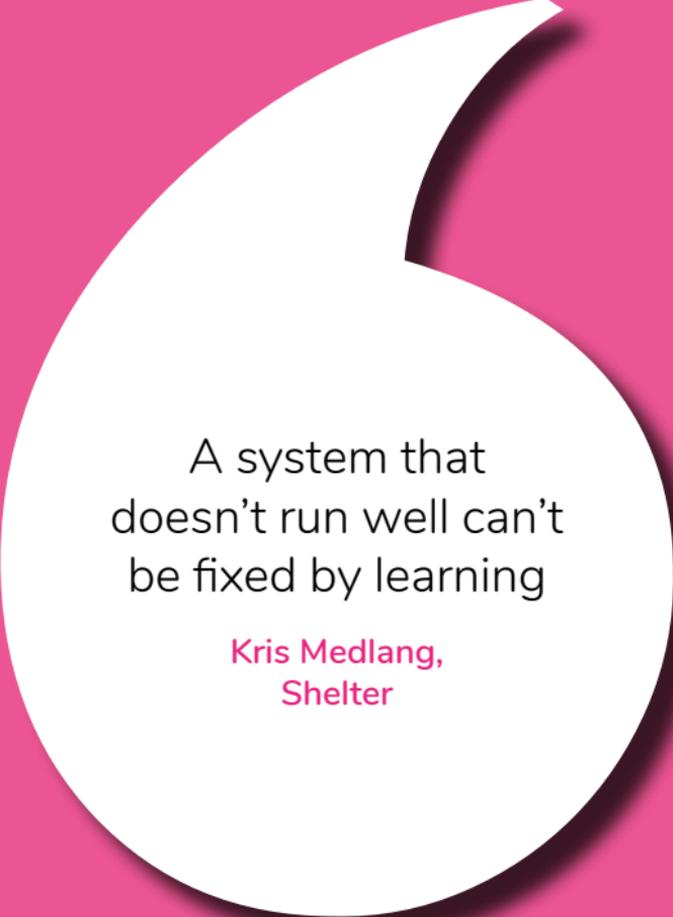
You can't support your organisation without understanding the context that you're working in. You'll need a breadth of data, not necessarily depth of data.

Example: Evaluating diversity

A breadth of data might include information from:

- **Advertising:** Where roles are advertised and how effective they are
- **Recruitment:** The number of applicants and the drop-off at shortlisting, interview and appointment
- **Glassdoor and Indeed:** What people are saying about your organisation
- **LinkedIn:** Who is saying what about your organisation, and what their background is

Other useful stats might include the pay gap for under-represented groups, HR grievances, sickness levels and turnover.



A system that
doesn't run well can't
be fixed by learning

Kris Medlang,
Shelter

Step three: Make recommendations

Setting out what should happen and when will almost certainly involve your organisation's systems and processes. L&D is often brought in to 'fix' people, perhaps after new systems and processes have been installed.

Think back to an IT implementation you may have been involved in. Often the delivery is planned, scheduled and about to go live when L&D is involved. Training is then usually on how to use the system, not how to integrate it into existing processes.

Performance consulting means using your influence and reputation to get involved at the start. This would allow you to scope out any potential impact, evaluate what processes need to be changed and what additional support is required.



When you deliver
what you've promised,
that's when you become
dependable and start to
have influence

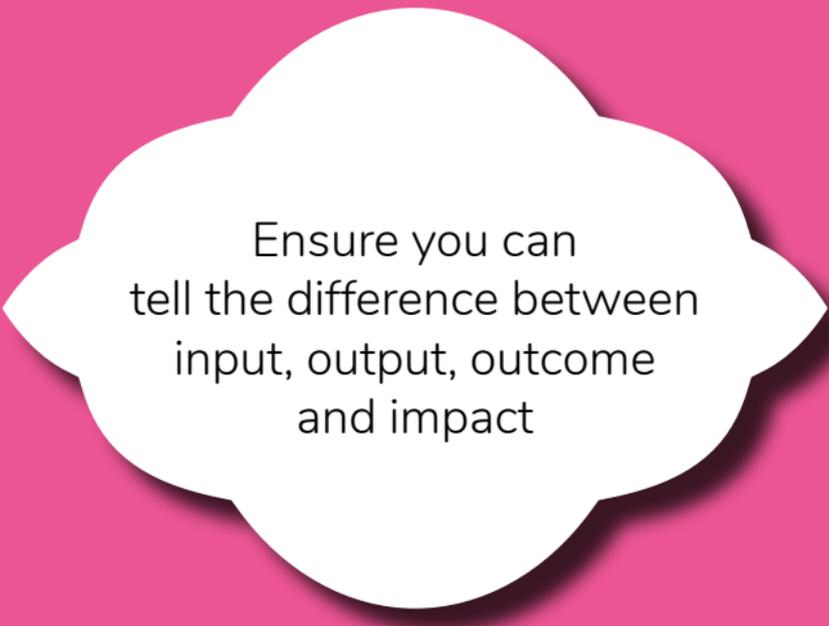
Kris Medlang

Step four: Take action

Having hierarchical authority – power – doesn't help performance consulting. Use your social authority and influence to make change happen instead.

Tip: Find role models

Quite literally, if people can't see others doing something, they won't do it themselves. Consensus helps decisions get made. When people are uncertain, they look to the actions and behaviours of others to determine how they should react. Consensus comes when, rather than using persuasion, you can point to what other people are doing. Find role models and champions and reflect on the way that your own behaviour influences others too.



Ensure you can
tell the difference between
input, output, outcome
and impact

Step five: Evaluate

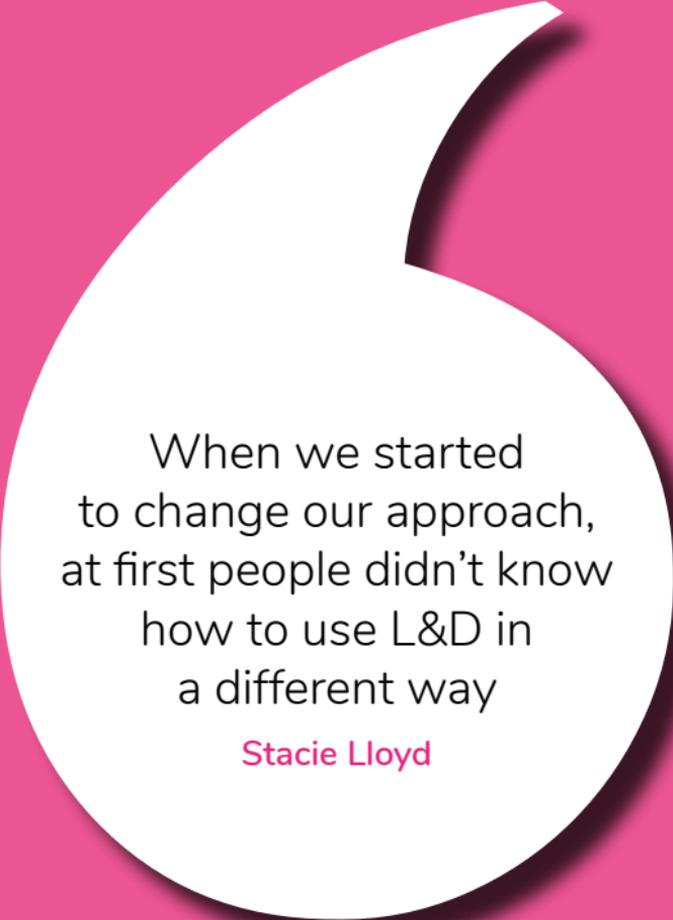
L&D is great at measuring input, like attendance and completions.

We also measure quite a lot of output. This includes numbers of tests completed, pass marks, downloads and happy sheet scores.

Performance consulting is focused on something quite different – on outcomes and impact. This means finding ways to measure changes in individual and team performance as well as organisational culture.

Example: Evaluating engagement

- **Input data:** Numbers attending courses; time spent on eLearning
- **Output data:** Test and assessment scores; eLearning completions
- **Outcome data:** Employee engagement scores; sickness data; grievances over sickness management
- **Impact data:** Performance and turnover data, financial cost



When we started
to change our approach,
at first people didn't know
how to use L&D in
a different way

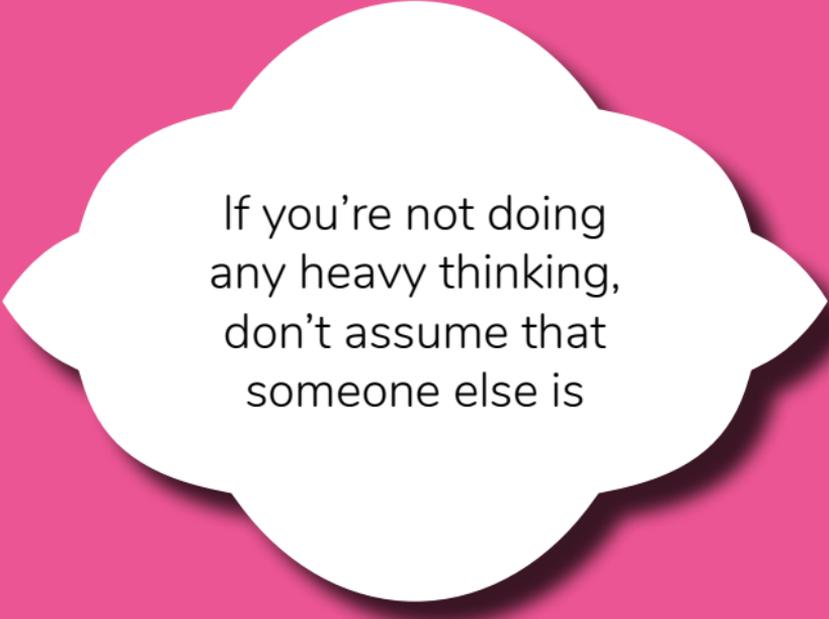
Stacie Lloyd

Case study: Royal Voluntary Service

Feedback – whether from the CEO, business partners or from running trials, surveys or focus groups – is an invaluable way of ensuring that learning meets needs at Royal Voluntary Service. Stacie Lloyd, L&D Manager, says it reveals ‘little nuggets’ that change the way learning is delivered.

For example, feedback revealed IT challenges that meant adapting learning. Simple solutions included sharing laptops. Hubs of multimedia resources - on the Moodle learning management system provided by the Charity Learning Consortium - can also be downloaded and accessed offline. When a new online appraisal process was launched, feedback led to dramatic changes.

Listening to key stakeholders and responding and adapting to needs was critical during the Covid pandemic, when the charity rapidly recruited 750,000 NHS Volunteer Responders.



If you're not doing
any heavy thinking,
don't assume that
someone else is

Key skills

#1 Heavy thinking

Heavy thinking is the combination of critical and creative thinking.

Critical thinking is about using evidence to support arguments, draw conclusions and use information to solve problems. This means interpreting, analysing, evaluating, explaining, sequencing, reasoning, comparing, questioning.

Creative thinking is about generating and applying new ideas in specific contexts, framing and reviewing situations in different ways, and identifying new links and perceptions. This includes combining existing parts to form something original, refining ideas, constructing theories, innovating.

Heavy thinking combines both and needs time, energy and effort. In a world where the instant, abbreviated and micro pervade, heavy thinking is exceptional. But if you don't want to be seen as lightweight, you have to do your heavy thinking!

It's easy to
assume performance
problems are due to a
lack of knowledge or skill
but that's rarely the case

Charles Jennings,
70:20:10 Institute

Exercise: Developing heavy thinking skills

Make a list of the three most important challenges you face at work right now. You probably have more than three but just describe the top three, and justify their order of priority from most to least important.

This is the **critical thinking** part.

Now re-describe these problems as if you are explaining them to a six-year-old. There are good reasons for asking you to do this. Being able to explain relatively abstract concepts in simple terms is an indication that you have a full understanding of a problem. It also challenges you to consider seeing things in a new light.

This is the **creative thinking** part.



The learning team
doesn't know all the
answers – we tap into
others' expertise to solve
problems together

Kris Medlang

Key skills

#2 Collaboration

Charity learning practitioners often work solo, so collaboration counts. Gather people around you with the following qualities by demonstrating these characteristics yourself:

Open: Be honest if you encounter a situation that is new, challenging or difficult.

Sharing: Give things away. Sharing knowledge and insight opens up pathways for the future.

Non judgmental: Don't jump to conclusions. Final outcomes are influenced by a lot of things and learning might only be one of them.

Caring: People fear what they might lose as a result of change. Support people who are grieving for the loss of processes, reputation and/or expertise.

Professional: Be self-assured and confident.



It takes effort to
make time to meet
people and become
more influential

Kris Medlang

Exercise: Forging key relationships

Make two lists.

The first list is people you've already met and want to develop your relationship with. Prioritise people within your organisation over those outside of it.

The second list is people you want to meet and create a relationship with. Again, prioritise people inside the organisation.

Make active attempts to connect, meet and develop relationships on both lists.

Review these regularly – weekly, monthly or quarterly.

Tip: Relationships are two-way

What skills, knowledge and expertise can you offer to help build relationships?



Asking coaching
questions can lead to
meaningful interventions,
rather than a
training plaster

Kris Medlang

Case study: Shelter

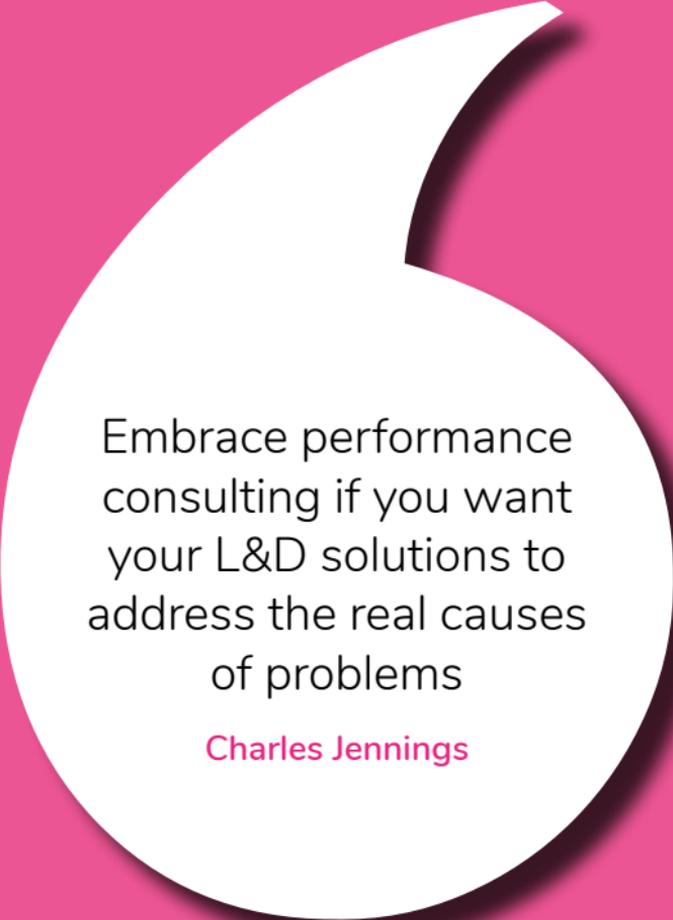
When Kris Medlang joined Shelter in 2017, learning was seen as a transaction. In a world of eternal busyness, people were reactive rather than reflective. He wanted to flip that.

Initially, he made an effort to meet people and build influence and trust within the organisation. He believes that credibility, alongside curiosity, authenticity and kindness, are key traits for learning practitioners.

In 2019 he completed an ILM coaching qualification and asking coaching-style questions has become integral to a new performance consulting approach.

“Coaching has changed my perspective,” he says. “Rather than jumping to solutions, I try and help people unlock their thinking.”

Change has accelerated over time and the L&D team is “learning that we can be more creative than we ever have been before.”



Embrace performance consulting if you want your L&D solutions to address the real causes of problems

Charles Jennings

Barriers

What stops you from performance consulting?

There are usually four main barriers:

It's the wrong time to be doing this

- 😊 Ask when the right time will be, get a date and agree a plan to work towards it

No one is doing it like this

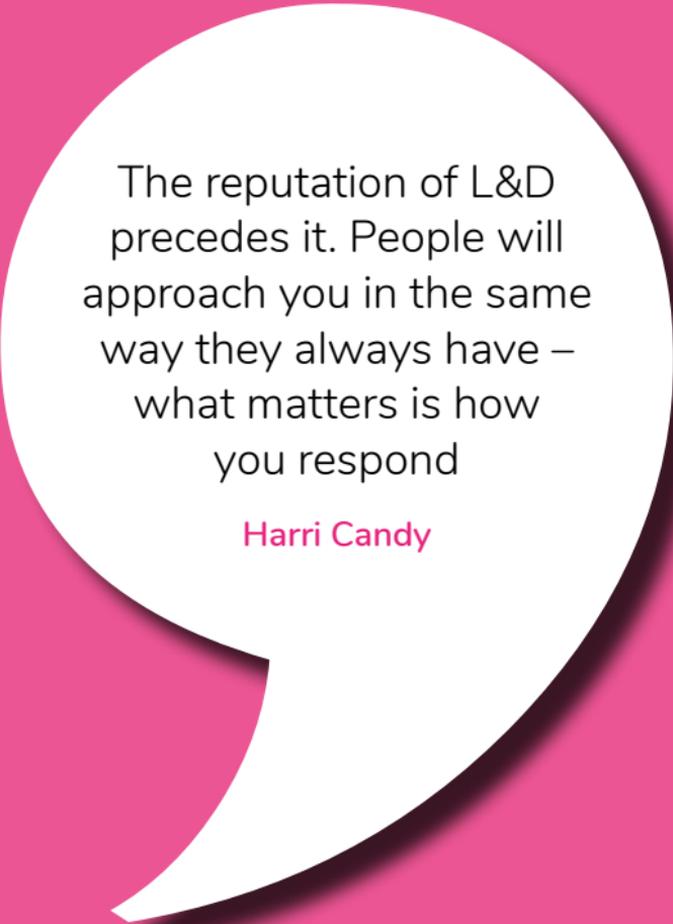
- 😊 Find exceptions, stars, case studies and innovators. Use them to show how you can apply the principles they used, if not the detail

We're not structured to do it this way

- 😊 Explain that this way of working will be cheaper in the long run, uses internal expertise and keeps key knowledge within your organisation

We need permission to do it like this

- 😊 Find out who has power and who has influence. Get them on your side to support your approach



The reputation of L&D precedes it. People will approach you in the same way they always have – what matters is how you respond

Harri Candy

Exercise: Overcoming objections

Try using 'feel, felt, found' to overcome objections.

- List the objections you hear
- Suggest a potential benefit of the changes you're suggesting
- Put these into a 'feel, felt, found' statement

For example:

- I understand that you **feel** this will take longer to implement
- Many people have **felt** the same way
- What they have **found** when they implement it in this way is that they save time on fixing things afterwards

Completing this exercise will help you clarify the benefits of a new way of working, which you can use to sell your ideas.



Get buy-in by
quantifying the cost
of not addressing
performance gaps

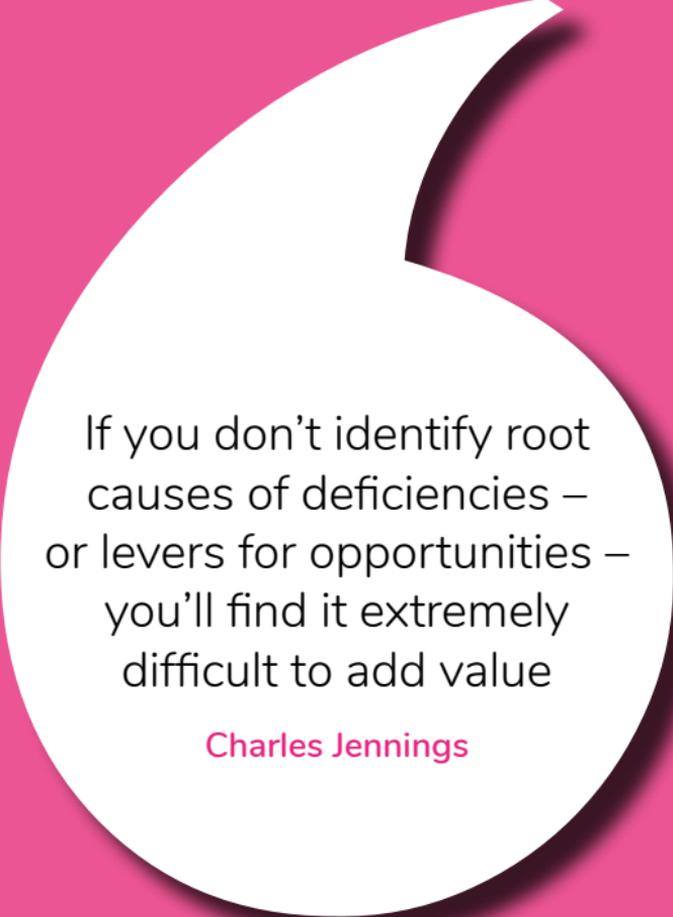
Nigel Harrison

Building a performance culture

Your organisation already has a **learning culture**. It includes the notes that people pass to each other, the shared conversations and the Teams and Zoom chats where information is shared.

A **performance culture** is where people understand the link between their aims and their way of working. Where senior managers can identify how individuals contribute to the organisation's performance.

L&D isn't solely responsible for the performance or learning of an organisation. But you can use a performance consulting approach to take responsibility for diagnosing problems and identifying causes, such as unrealistic aims, poor relationships, weak systems and disruptive behaviours. Only then can you suggest the right solutions.



If you don't identify root causes of deficiencies – or levers for opportunities – you'll find it extremely difficult to add value

Charles Jennings

Exercise: Strengths & weaknesses

In this list of traits, what do you already have and what do you need to develop?

Pragmatism: Finding real world solutions.

Assurance: Confidence and professionalism in every part of the consulting process.

Responsiveness: Flexing to the needs of all stakeholders.

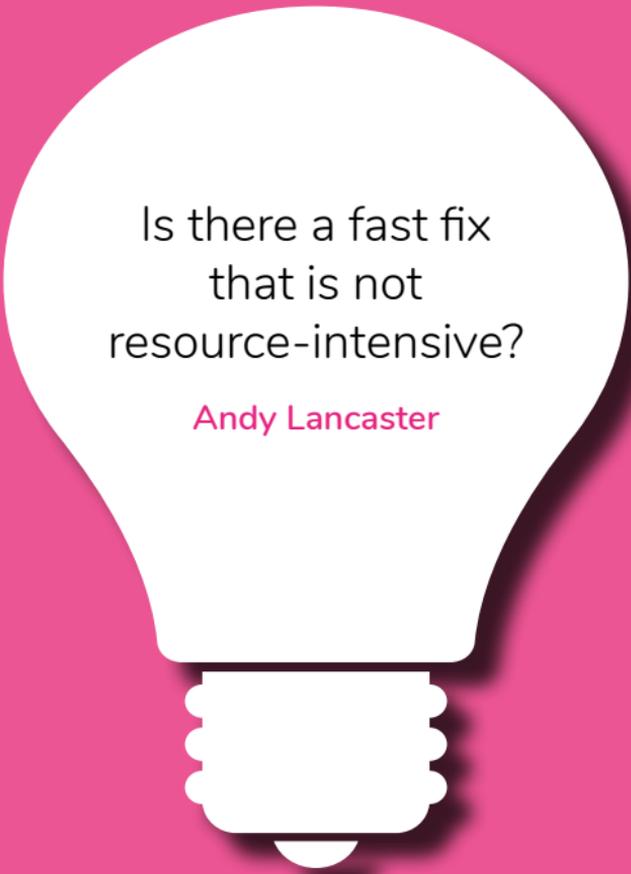
Tangibles: Finding the right resources to deliver what's needed.

Knowledge: Knowing who to ask to find the right answer.

Empathy: Understanding others' viewpoints and recognising your own bias.

Reliability: Delivering what's required, on time, on budget.

Ask people who display these traits how they have developed them.



Is there a fast fix
that is not
resource-intensive?

Andy Lancaster

Quick tips for success

- ✓ Have an interest in people – they'll help you do your job
- ✓ Be curious about your colleagues to find out what they know
- ✓ Speak to lots of people about their work to find out what they do
- ✓ Learn about the way that different teams work
- ✓ Be alert to what the next organisational challenge might be
- ✓ Have a sense of humour
- ✓ Get quick wins in – they help build relationships
- ✓ Be aware of your own biases and be open to thinking (and doing) things differently
- ✓ Find a community you can join to work through challenges
- ✓ Keep using a performance consulting approach so it becomes the expected way

About the Charity Learning Consortium

We are a one-stop shop dedicated to providing affordable and effective learning solutions for charitable organisations. Membership includes a suite of eLearning, charity-specific video content, a learning management system and access to a vibrant community for members to connect and share good practice. You also get a whole host of other goodies as part of an annual subscription.

Hundreds of charitable organisations benefit from collaborating with us. Bringing them together enables the Consortium to offer cost-effective, quality eLearning to more than a million people across the UK. Our collaborative approach paves the way for learning and development success, with ongoing support, fantastic networking opportunities, relevant workshops, and an inspirational Charity Learning Conference & Awards.

charitylearning.org

About the author

Andrew Jacobs

Andrew Jacobs is the Learning Principal for Llarn Learning. Known for innovative thinking about learning, training and technology, he has significant experience in a wide range of roles.



This experience has been learnt in numerous industries and sectors, most recently with HMRC.

Andrew has a specific understanding of developing online and digital solutions for learning and engagement. He is a Fellow of the LPI and a CIPD Leader in Learning. He received the Internet Time Alliance award for his work on informal learning in July 2020. He blogs daily at lostanddesperate.com and produces a podcast called Women Talking About Learning.

Llarn.com

‘We should work like engineers to diagnose problems, less like shopkeepers offering a training pick-and-mix’

Martin Baker
Charity Learning Consortium