

Six Signals – Navigating Your Way through a Client Meeting

By Ron Drew Stone, 29 August, 2010

One of your clients has called to set up a meeting to discuss a training program she wants for her team. You are faced with a sense of the unknown as you plan for the upcoming meeting. Why does she want this training? The answer to this question is of crucial importance because a successful product delivery must be aimed squarely at the need. If a training solution is to meet client expectations and make a contribution to the business, the driving force for the need must be determined. Unfortunately, many training programs are delivered without knowing the answer to this crucial question. Sometimes the training professional is put in a position of navigating for the answers with very little support from management. It is up to the training professional to correct this unproductive situation.

There are three significant challenges for the first client meeting. 1) Size up the situation and determine the *business driver* for the training request. 2) Collect as much relevant data as practical from the client regarding performance issues and how training can resolve any deficiencies. 3) Gain approval for additional data collection activities when the client does not have sufficient answers.

How these three challenges are approached to satisfy the client's request is an early indicator of how successful the project will be. The brevity of this article allows ample space to address one of these three challenges. We will address the first challenge, *sizing up the situation and determining the business driver*, because it opens the door to help in meeting the other two challenges more easily.

Six Signals and the Business Driver: A Good Pair

When a client or sponsor requests training, they usually provide an early signal that suggests what is prompting the request. I refer to this as the Six Signals. Table 1-1 lists the signals and the context of their meaning.

Table 1-1: Six Signals – Six Situations that Drive Training Needs	
Signal	Context
Business Deficiency	An opportunity exists to improve the business due to a <u>deficiency in one or more business outcome measures</u> .
Execution Deficiency	Employees are not executing an <u>existing</u> job requirement or task as they should.
New Expectation	<u>New</u> knowledge, skills, competencies, or behaviors are required to perform a <i>new</i> or <i>existing</i> job or task.
Business Change	A <u>change</u> occurs in business or operational philosophy, policy, process, procedure, product, strategy, technology, or service.
Business Opportunity	Current performance is not necessarily a problem, but an <u>opportunity</u> exists to provide training, development, or other interventions that will sustain the organization's performance or avoid negative consequences in the near future.
Business Compliance	A need exists due to a management directive or a regulatory, licensing, accreditation, or certification <u>requirement</u> .

It is very important to identify and verify the client's signals as quickly as possible. There is no particular order of importance or frequency of occurrence and you may hear more than one signal during your meeting. Sometimes we have to probe to get the signals to surface. We can then frame the context of the situation as we move forward with a line of discovery questioning. The main goal during the initial client meeting is to determine what is driving the request, what the appropriate business measures are, and the nature of the execution performance gap.

You could actually show these six signals to the client, although it may not be necessary. Just use them as a reference point to determine what the client wants and why they want it. The six

signals allow the training professional to reflect quickly on a situation and then apply the signals to the specific client scenario by asking a sequence of relevant questions. An example may help to understand this better.

Client Scenario

David our client says that employees are required to execute new job behaviors. All employees are asked to go the extra mile to assist customers (for example, greeting customers professionally, asking if they need assistance, thanking them for choosing our products and services, etc).

Can you determine which signal from Table 1-1 applies to this scenario and how you would proceed to question the client? Give it a try and then look at the answers below.

The signal from Table 1-1 is “New Expectation”. The signal from David does not indicate why the training is needed other than it is based on a new job requirement. Unless we approach this situation properly the conversation can continue for a long time by discussing what is required without ever addressing other important questions such as; Why is the new behavior required (what business deficiency prompted it)? Is it a decrease in customer satisfaction scores? Increased customer complaints? A decrease in sales? And how will management support sustaining the new behavior? And how will we build job relevance into the training solution? *Here is a possible line of questioning with David.*

1. What are the various situations of the employees coming in contact with customers (face to face, telephone, email)?
2. What are some typical unacceptable situations that are happening now in these scenarios?
3. What are some examples in the organization in which acceptable behavior is occurring? What is influencing this positive result?
4. Is there a known difference in business outcomes between the acceptable and unacceptable behavior scenarios (for example, how customer buying behavior, or satisfaction, or complaints are influenced differently)?

5. What are our targeted business improvements (from #4 above) following the training?
6. How strong is management's commitment at all levels to supporting and requiring the new employee behaviors?
7. How will management demonstrate that these new behaviors are important?
8. How will management sustain the desired behavior over time?
9. Are there reinforcement strategies to influence the execution and desired behavior by employees? Are there incentives, recognition, or rewards when proper behavior is demonstrated by employees?

David presents a training need that seems to involve some skills. But it seems to be mainly a new expectation requiring (1) clarity about the expectations and (2) an attitude to execute with maybe some new skill requirements. Training may be required in order to promote a unified purpose, thorough knowledge of the expectations, and to communicate relevant scenarios to ensure understanding and how to properly interact with customers.

Management commitment may be a major issue in David's scenario. There is an inherent danger that management may assume that training is all that is needed. When we ask people to change their behavior, we are asking them to change old habits. One of the first things employees will likely do in this situation is observe how management behaves and whether or not management is serious about this requirement. If there appears to be no sustaining interest or management support for this behavior, employees may revert to old habits. Management reinforcement will be the key to a successful solution.

Try asking David following question and see what response you get. "Even if we do the best job possible with the training, what is the probability that the employees still will not execute?" As the discussion develops, this is your opening to ask the client how he will support the effort to sustain results.

Closing Thoughts

The line of questioning in David's scenario provides an example or general idea of how to proceed; it is not intended to represent the complete range of possibilities. Perhaps you have

some great questions to ask as well. The idea is to pick up on the signals and dig deeper to get relevant information and to determine the business driver. As is often the case, the client may not have all the answers, thus the need to press for approval and support (and the time) to get additional information from other sources. This includes discovering what the root cause is regarding any performance deficiencies and making recommendations accordingly. Happy trails and don't forget the signals to help you in finding your way.

Note: This article is taken with permission from passages of Ron's book, *Aligning Training for Results: A Process and Tools that Link Training to Business*, Pfeiffer, San Francisco (2009). You can learn more about the six signals and needs assessment by reading this book or attending one of the author's needs analysis workshops.