Talent Development 18 Consulting & Business Partnering

by Bob Whipple, MBA, CPTD

Section 3.2 in the CPTD Certification program for ATD is Consulting and Business Partnering. Section A reads, “Skill in synthesizing information to formulate recommendations or a course of action to gain agreement, support, and/or buy-in from stakeholders.”

To be successful at consulting, you must operate as a strong business partner with the client. The people involved in the training must be truly excited about the venture and anxious to have it work out well for them. If you follow these eight tips, you should have agreement, support, and full buy-in.

1. **Start with solid research**

The way to gain commitment is to listen well to what the participants say they need. This sounds easy, but it is more difficult than it seems. I start with interviews of the key players in the organization. That sets the stage, but it is not enough because they may not be able to articulate the real needs.

2. **Needs analysis**

I do a survey of the people involved in which they select what topics would create the most significant payoff for them. The key here is to involve as many people in the group that will ultimately be trained so that each person recognizes he or she had real input into the topic selection.

3. **Create a rough draft of the program**

Based on the research, I put together a draft of the main topics to be covered as well as the delivery style to be used. Be sure to state the objective clearly and outline the deliverables in detail.

4. **Review and gain commitment**

This is a critical step that is often overlooked or short changed. Let me share an example of how this looks, if it is done well. I was doing a design for a CEO of a major training effort. I did the research, needs analysis, and a draft of the proposed program. I came back a few days later and shared a list of seven things the proposed program would accomplish. The CEO looked at the seven things and wrote **BINGO** in large letters next to my list.

5. **Design the program in detail**

In this phase it is necessary to customize the material so that you will be speaking "their language." Do not offer the same program for a hospital as you would for a manufacturing plant. Make the entire program feel like it was made for that specific client. I normally use their logo and pictures that reflect their actual business.

6. **Make sure the program delivery is user friendly**

For people to be excited about the training, they need to have it done on a schedule that is most convenient for them, not you. They may want it delivered very early in the morning or even on weekends. Always bend to their needs.

7. **Avoid "Death by PowerPoint."**

Only a few points per slide, and do not read the points. Instead, talk about the topic area letting them absorb the actual words on the slide. Always have a photograph (and obtain the license to use it) on each slide. Do not use clip art or cartoons. Make sure the photo is illustrative of the points you are making and has some element of creativity or twist to keep people interested.

8. **Make the training experiential**

Do not have just hours of lecture. Have an activity, like a role play or body sculpture every 20 minutes or so to break up the training. This keeps people from getting bored.

Following these eight tips will ensure your program has the full support of people in your client's organization.

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