Tired of Being an Order Taker?

by Dick Handshaw

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The best part of the evolution of my job at Handshaw is that I get to spend a lot more time talking to people who are actually out there, who are keeping up with requests daily, and keeping the people in their organizations trained. For the most part they don't complain a lot, but if you ask them what bothers them most about their jobs, they will tell you they don't like being order takers. So you might ask, if not order taker, what do they want to be? The answer would most often be a strategic business partner.

When I ask people why they are in this predicament, they reply with one of two things. Many of them may say they lack the skills to be a performance consultant along with all the other things they have to do in their jobs. Most of them would say they just don't feel like it's appropriate for them to be talking directly to the head of a line of business, or even if they do, they don't feel it's their place to tell them what to do. The first problem might not be that hard to resolve. We could probably give them some training with plenty of practice and feedback to build their consulting skills. The second problem is a little more difficult.

I'd like to take this opportunity to speak directly to those of you who find yourself in this situation. Even if you build the skills, it will be difficult for trainers to act as strategic business partners if the culture, meaning your manager, won't support an environment where consulting is accepted, encouraged, and rewarded. Don't be too hard on your manager though if he or she doesn't want to jump right in and support you. The transition will be time-consuming and there is definitely some risk involved. You can save your manager a little angst by starting out slowly and working with one key client who is likely to support you and work with you. Once you have a success or two to which you can point, you can begin to roll the process out further.

Let me warn you of two pitfalls. Performance consulting is not offering your opinions to your clients and hoping they will take up your ideas. Performance consulting is asking the right questions, so your client will discover the correct solutions with you. And finally, avoid putting the title "Performance Consultant" on your business card, at least right away. Advertising the fact that you are a consultant doesn't get the job done nearly as effectively as acting like one.

Proactive Performance Consulting—Why Bother?

The Robinsons begin their chapter on "Proactively Identifying Performance Consulting Opportunities" in the Second Edition of their book *Performance Consulting* with a quote from Wayne Gretzky. It reads, "I skate to where the puck is going to be, not to where it has been." That's the best answer I can think of for the question posed by my title.

Now let's think about what that means to people who have to provide learning solutions every day, on a budget, on a schedule. It means

we have to pay more attention to developing relationships. We want to be brought to the table earlier and we want to participate on a strategic level. That means we will do far better if we seek to understand our client's business, including his or her pains and opportunities, before a specific initiative or project arises. Building trust among individuals takes time, especially when there are risks at stake. That's why relationship building is so important. It's not something you can put on a project schedule or assign a convenient due date. It's an investment you make over time and it does pay off. In their book, Jim and Dana Robinson go on to state that the purpose of the proactive discussion is "to deepen your knowledge of your client's business and to strengthen your relationship with your client. But you also have your antennae up to identify opportunities where you might add value when you have not been asked to be part of the project."

Mastering this simple skill alone will resolve most of the complaints I hear about being seen strictly as an order taker and having to use valuable corporate money and time developing learning solutions that we know will add little value. Beginning a methodical process of Proactive Performance Consulting will position you to be invited into opportunities earlier in the process. It will also give you access to information you probably haven't had in the past. Lastly, you will have a greater and more informed voice in identifying solutions to problems, whether they are learning interventions or other types of interventions.

Now about that simple skill; it really is easy, enjoyable, and interesting. Visit the **Resources** tab on my website **www.dhandshaw.com** for **Proactive Consulting Interview – Good Example**. You will see a 13 minute video role play showing one possible way to conduct this interview. If you are interested in a workshop on this skill, go to the **Workshops** tab and learn more by reading the description for the **Performance Partnering Workshop**.

The Reframing Meeting

Once you establish a proactive interviewing routine and develop a true consulting relationship with your client, you may no longer need the skills of conducting a reframing meeting. However, most of us are going to come across the need for this type of meeting more often than we would like.

The purpose of the reframing meeting is simple. You need to change your client's focus from solutions to defining business results and defining required performance outcomes. While the purpose is pretty straightforward, the actual skills required to achieve the desired outcome require practice and can be challenging. One difficulty of this meeting is that your client brings a pre-conceived solution to the meeting and is expecting to tell you what he or she thinks is needed. Your client may expect you to dutifully "take the order." Perhaps the biggest difficulty in conducting this interview is that you also may enter the meeting with your own pre-conceived solution. In either case, we call this "solution jumping," and it is to be strictly avoided in this meeting. The next step from this meeting should be to agree to gather some data or conduct some analysis to have better information with which to make a decision about problem definition and solutions.

The workshop that I just conducted for the ASTD International Conference and Expo focused on eight principles for conducting a reframing meeting. You can find those **Reframing Principles** by clicking on the **Resources** tab on my website **www.dhandshaw.**

com. Once there you can also view a short role play video called **Reframing Meeting – Good Example**.