When organizations are looking to bring about significant performance changes, they often engage the support of consulting organizations. In effect, organizations use consultants to build capacity.

Like many consultants, I aspire to work at deep levels of learning: working with clients so they build capacity in ways that affect them profoundly. That is, I hope to make a contribution that lasts; such that the organization is left with greater capacity to achieve important results. To do this, I need to focus on the depth at which learning occurs.

In part, the need for depth stems from the particular kind of consulting that I do. I work with individuals and teams concerned with issues like leadership, vision, collaboration and change. It is work that is at the edge of the learning — performance debate. Organizations may want improved performance in these areas and want it quickly, but there is no short cut. The way to get good leadership, for instance, is by building people’s capacity for leadership through learning. This is a process that requires a depth of learning by those involved and thus takes time.

Associating the word ‘depth’ with learning is important. It has powerful connotations that signal the significance of the change involved in building capacity. When we speak of things done in depth we suggest that the work involves intensity, complexity, thoroughness, richness and insight. The term ‘depth of learning’ makes it clear that we are moving beyond the mundane.

How do you build consulting partnerships that deliver this level of learning? What has the biggest impact on the depth of learning conducted within organizations by consultants? In reflecting on these questions, I will explore two primary factors that impact the depth of learning and change. The first is
the quality of the partnership between the client and the consultant, and the second is the quality of the underlying design of the development journey. In doing so, I will address what I have found gets in the way of, and those dynamics that enhance, the ability to create partnerships that foster a depth of learning.

**ALL PARTNERSHIPS ARE NOT CREATED EQUAL**

I’m aware that the nature of the partnership I have with my clients has a significant impact on the extent to which I am able to make a difference and truly build capacity for my clients. The higher the degree of trust, mutual co-operation and shared understanding, the more likely it is that desired outcomes can be achieved. In other words, to achieve a depth of learning, we need partnerships that are out of the ordinary.

Bill Isaacs, author of the book *Dialogue: the art of thinking together*, makes the same point. The quality of our conversations depends on the relationships in which they are contained. Conversations associated with a depth of learning are filled with intense emotional and intellectual energy. Just as a strong container is needed to hold a highly energized liquid, intensely energized conversations require strong relationships as their containers. Without such relationships, these conversations either do not happen or result in people getting hurt in the process.

Partnership is one way of describing the quality of the relationship required. Partnership is defined as “A relationship between individuals or groups that is characterized by mutual cooperation and responsibility, as for the achievement of a specified goal.”

In a recent book, Peter Senge and his colleagues have outlined 4 levels of relationship, and provide us with a framework for describing the quality of

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*a* Published by Doubleday Currency, New York, 1999.


partnership that exists within a consulting relationship. Their model was originally created to describe doctor-patient relationships, and I have translated the language and context to fit the consultant-client relationship.

**Level One: Transactional.** At this level, the client comes to a consultant believing something is wrong, and needs to be fixed. The client has a problem and the consultant is a potential source of solutions. The nature of the partnership is mechanical, assuming the relationship or partnership has no affect on the outcomes achieved. The expectations are: “You have expertise in this area. Come and do your stuff and it will be fixed.” Service consultant Ron Zemke, expressed the frustration this work has for many consultants when he described it as “throwing artificial pearls to real swine”.

**Level Two: Changed Behaviour.** The second level relationship is one that focuses not on the broken part, but rather on how the issue/opportunity is related to behaviour. Here the client recognizes that the solution is not something that is done to them, but rather that some change in their behaviour is required for the outcome to be successful. Consultants and clients work together to explore what behaviour change is needed to really make a difference.

**Level Three: Assumptions.** At the third level, the consultant and client go beyond the behaviour. They work together to explore the reasons behind the behaviour. That is, they explore and challenge underlying assumptions, values and beliefs that shape what is happening in the client’s system. This requires a stronger partnership because assumptions are not readily available. Assumptions exist beneath the level of conscious awareness and it takes time to bring them to the surface. When they do surface they contain elements that are contradictory and irrational — so the relationship has to assimilate the embarrassment and threat that is generated.

**Level Four: Identity.** The fourth level is where identities are changed. This is a consulting relationship where each is open to discovering themselves in the relationship, it is co-creation in the real sense of the word. The level of identity encourages each party in the relationship to consider who they want to be. In this
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relationship, the consultant is also altered as a result of the interaction — who they are, and how they see themselves are transformed in a relationship of mutual influence and vulnerability.

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Transaction</td>
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<tr>
<td>2</td>
<td>Behaviour</td>
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<tr>
<td>3</td>
<td>Assumptions</td>
</tr>
<tr>
<td>4</td>
<td>Identity</td>
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When I used this framework to reflect on my own experience, I was struck by several insights.

_There are strong pressures on all parties to keep the relationship at surface levels._ Every business that I have worked with or in has been affected by the time pressures and the need for tangible results. This can result in clients engaging in development to “be seen to be doing something”, without really engaging serious effort for change, as well as consultants not thinking beyond past the solution they created to the last engagement they had.

I am convinced, however, that the more the relationship stays on the surface, the less likely depth of learning and real change will occur. To get the necessary results, both client and consulting organizations are going to need to expect more of each other, and invest more in the development of a partnership.

_Using the word “partnership” to describe the relationship does not make it so._ Even where clients and consultants understand the need for partnership, there is danger that the word will be used, but the spirit and reality of the partnership will not be achieved. In fact, some of the clients who have been the most vocal and explicit about the need for partnership have been those least likely to operate in the spirit of partnership. An experienced colleague once quipped, “When a client says ‘partnership’ what they usually mean is they want you to be _extra_ attentive to doing _what they want, when they want it._”

Recently, as part of a consulting team, I worked with a large, global organization. We spent just short of ten weeks working with the client to understand their needs and how we could contribute to the project team they were establishing.
We were interviewed at multiple levels to ensure “values fit.” At the outset, it seemed that all involved strongly valued partnership. That was until, late in piece, the conversation turned to some needs we had as consultants: needs we considered critical if we were to deliver what the client expected. Despite clear verbal and written communication, within four days of raising our needs as part of the discussion for planning the project, we were dropped from the team (just prior to the final signing of the contract). The reason? According to the client, we lacked a “partnership mindset.”

While there were many factors that contributed to this, what was startling to me was the speed at which conversations deteriorated once a conversation about our needs were included in the planning and scheduling.

**Level Four relationships are rare.** A number of factors contribute to this. Forming deep relationships is time-consuming and difficult. Further, as a consultant, the focus is on bringing about change in the client therefore explicitly engaging in conversations about how to change consulting firm’s own identities have been limited because they seem so self-serving. While it is counter-intuitive to think that conversations about one’s own identity are in the best interests of the client, recent client reviews have shown me that clients can and do take an active interest in the consulting organization’s operations and future. I am currently exploring different ways of having these conversations with clients.

**The start of the relationship has a big impact on the ability to get real partnership.** This is often expressed as a desire to have a good ‘fit’ with a consultant: a close match between the consultant’s capabilities and values and their own culture and need.

Having started my life as a consultant in smaller consultancy firms, the issue of fit has always been very visible. In a very real sense, when you work as part of a smaller organization, the distinction between your own personality and the identity of the consulting organization is negligible. You know that you and your services are being assessed by the client. You feel you are being weighed in the balance.

When I worked for a large, global consulting organization, I assumed that this would be different; that the brand would give clients a sense of assurance that
meant they were less concerned with the personality of particular consultants. I was wrong. Fit still mattered. If anything, clients are becoming more discerning and exercising more explicit choice regarding who takes part in a project team. Clients are increasingly recognizing that more than a technical exchange is required. A global brand with a well-validated approach and expertise does not in itself guarantee a successful engagement.

FALSE FIT

Both clients and consultants engage in behaviours that get in the road of establishing successful fit and forming sound relationships. Both can be tempted to shortcut the process of establishing a partnership by using surface level indicators of ‘fit’.

Consultants, for instance, are often frustrated by clients’ insistence on fit — complaining “we will not be dragged into a beauty parade with the client”. This is especially so when a consulting firm has made a substantial investment in establishing processes that are ‘tried and true’ and has a need to ensure that work is spread around the consultants available (utilization). Further, internal decisions regarding fit are often based around comfort with working together, not necessarily the value they will add to clients.

The desire to “get the business” can often drive smaller firms to overlook problems they foresee with fit in the relationship. Consultants with fewer colleagues available may feel forced to ignore an evident mismatch of skills or values and present oneself as the best option to meet a client’s need.¹

Clients, on the other hand, may find that getting the consultant they want is not in their best interests. In the attempt to get best-fit, I have seen clients make poor judgments regarding who they will work with. Colleagues who I deemed to

¹ Published by Doubleday Currency, New York, 1999.
² My personal approach to minimize the pressure for this has been two-fold. The first is to be honest about my own sense of fit. This takes a level of integrity and willingness to take some short-term financial “hits” that I trust will have a long-term benefit for me and the client. The second is to create a network of trusted associates so as to be able to provide a real sense of choice for clients, and a legitimate option between “yes I can do it” and “no I can’t help you.”
have a strong fit with the desired outcomes and values of the client have been rejected by clients in the early stages.

In part, this is because the notion of “fit” has strong elements of looking for similarity — a match between those being developed and those contributing to the development. Sometimes, however, to create the necessary growth and development, differences in personality and perspective are necessary. In part, it is because decisions regarding fit are made quickly and on superficial factors such as age, gender or ‘presence’ during the selling process e.g. is this person too old or too young relative to those being developed. This can result in, what we could call, “false fit,” a poorer quality client-consultant partnership and consequently a reduced depth of learning.

I have found it valuable to reflect on my approach to the issue of fit. Take time to consider your own approach by reflecting on the questions in the box “Reflecting on Fit.” Questions are provided for both parties to the consulting relationship, clients and consultants.

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### Reflecting on Fit

#### Questions for Clients

On what basis would you take advice on appropriateness of fit from a consulting firm?
What would tell you that the “fit” is not right, and to disengage?
What are the critical factors to pay attention to with regards to fit (beyond stereotypes)?

#### Consultants

What client work do you say ‘no’ to?
What would tell you that the “fit” is not right, and to disengage?
What are the critical factors to pay attention to with regards to fit (beyond stereotypes)?

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The quality of the partnership (and the associated openness and trust) impacts the ability to have real conversations about the underlying factors contributing to change, and either supports or inhibits a depth of learning. Having explored some of the dynamics that enhance or reduce the quality of partnership, let’s look at the second key factor for creating a depth of learning — the underlying design of the development approach.
DESIGN: THE UNDervalued Art

Who has the greatest impact on the successful operation of a cruise ship?¹ You might think the captain, the navigator, or the purser. The reality is that the designer of the ship plays a fundamental role in shaping everything that happens on board and what people in other roles are able to achieve. And just as the boat designer is the forgotten contributor to a cruise ship’s success, in my experience the design of the process (and the design ability of the consultant) is often undervalued by client and consultant alike.

CEO Kevin Roberts has described his efforts to turn Saatchi and Saatchi from an “advertising agency” to an “ideas company”. I believe this transition is needed in consulting. We ought not to be technical experts in the business of delivering programmes, but rather “people architects” who are able to design and co-create developmental journeys for organizations.

The consulting process involves four stages:

1. **Engagement**: where client and consultant agree to work together on a project of a particular scope.
2. **Design**: where the architecture of the approach is determined, with consideration given to the processes and activities that will deliver the outcomes the client is seeking.
3. **Delivery**: putting the design into action, working through the activities and processes.
4. **Evaluation**: reviewing what has been achieved by the process so that lessons learned can be captured, outcomes identified and so the parties can agree on when to stop.

The design stage is critical to the success of the entire process as it informs and impacts everything that happens with the client. Which raises the question, why is this stage so often neglected?

¹ Peter Senge posed this question in his article “The Leaders New Work: building learning organisations” (Sloan Management Review, 31, 1, Fall, pp. 7–22, 1990).
Many wrongly assume that a design that has worked in one place can be readily transplanted to another. They underestimate the need to learn during the process of design: to learn about an organization’s culture, its core group, its history, its business and so on.

Design is also costly. Engagement and Delivery are far more visible to clients and the costs associated with them are easy to justify. Clients may be dubious, even cynical about the need for customization of a consultant’s products or process when they believe they have already made the effort to identify an expert: someone who should already know what will and will not work.

Part of this cynicism I can understand. Many consultants claim a high level of customization when the reality is that few actually provide it. Clients are rightly frustrated when they pay for something that is not delivered.

In working to make customization real for clients, I use a matrix, shown in the table “Levels of Customization” which highlights the options available. Rather than being an exhaustive list of options, it is meant to be illustrative of the different levels of customization that are possible, so that my clients can choose the appropriate level of customization for their needs. It also encourages clients — and me — to use processes appropriate to the level of customization for which we are aiming. It makes little sense, for instance, to use highly customized evaluation for processes that were ‘off the shelf’.

**DESIGNING TO ACHIEVE A DEPTH OF LEARNING**

If design is a critical factor for creating a depth of learning and achieving real change — what needs to be done to ensure good design? In my experience, five key principles help with the design process. Let’s consider them.

**Design with multiple stakeholder input**

In a consulting partnership, design needs to be a collaborative process. The key question is, “collaboration with whom?” Reflecting on development initiatives I have been involved in, it is clear to me that often as consultants, we find
## Levels of Customisation

<table>
<thead>
<tr>
<th>Level of Customisation</th>
<th>Design Process</th>
<th>Development Process</th>
<th>Development Materials</th>
<th>Measurement</th>
</tr>
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<tbody>
<tr>
<td>Extent of Collaborative Design</td>
<td>Extent of Collaborative Design</td>
<td>Depth of Skill Building in Workshops</td>
<td>Skill Building and Development Experiences in Workshop</td>
<td>Development Experiences Beyond Workshops</td>
</tr>
<tr>
<td>Content</td>
<td>Content</td>
<td>Process</td>
<td>Process</td>
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### “Off the Shelf”

- Consultant and Senior Line or HR Manager.
- Pre-determined content areas.
- Presentation of ideas/tools.
- Presentations, Videos.
- Discuss lessons and next steps with manager, peers, or staff.
- Facilitator(s) contracted who have not been involved in discussions regarding organisations future and needs.
- Key principles and workshop exercises only.
- Workshop evaluations.

- Think about issues/ideas and apply to own situation.
- Group discussion.
- Individualised development planning.
- Use of movies, literature, music to stimulate and reinforce learning.
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<tr>
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<th>Development Materials</th>
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</thead>
<tbody>
<tr>
<td>Extent of Collaborative Design</td>
<td>Content</td>
<td>Depth of Skill Building in Workshops</td>
<td>Case studies. Simulations.</td>
<td>Facilitation</td>
</tr>
<tr>
<td>Consultant, Senior Line or HR Managers, and cross-section of participants.</td>
<td>Customised selection of content based on needs analysis.</td>
<td>Practice of skills/tools with peer feedback.</td>
<td>Community service projects. Shadowing other executives/peers.</td>
<td>Facilitator (s) fully involved from initial needs analysis, design, and delivery.</td>
</tr>
<tr>
<td>Practice of skills/tools with expert facilitator feedback.</td>
<td>Self or 360° Assessment</td>
<td>Coaching and mentoring (internal and external).</td>
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<tr>
<td></td>
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<td>Extent of Design</td>
<td>Skill Building and Development in Workshops</td>
<td>Depth of Content</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Content</td>
<td>Development Experiences in Workshop</td>
<td>Facilitation</td>
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- Fully Customisable
  - Consultant and Senior Line or HR Manager, and full team of participants.
  - Customised selection of content areas, and development of unique examples, exercises, and simulations from the organisation itself.
  - Video practice and feedback with peer/expert feedback.
  - Actor role plays with current, real work situations.
  - Real-time strategic facilitation.
  - Job rotations, Special projects, Internal alignment of people systems to match development outcomes (e.g., recruitment, remuneration, etc.).
  - Facilitator(s) fully involved from initial needs analysis, design, and delivery AND internal leaders actively used to develop others (recognised role models who can provide relevant examples).
  - Full reference manual and on-line development materials.
  - Tracking key behaviours/outcomes and key business results over 3–5 years.
ourselves marketing to, and therefore designing solutions based upon, information provided by either senior line or HR managers. Further, it is not uncommon to find that the development needs and agenda described by these managers are based on untested assumptions about the needs of the target audience.

One simple habit I have found effective has been to solicit input into the design of the programme from participants. Rather than talk to everyone involved, I ask to speak to a sample of the group being developed. I typically ask for someone enthusiastic, someone typical of the group, and someone likely to be most cynical about the process. In discussing the business situation, the team dynamics, and their own personal expectations, I find that the final design of the programme is often significantly different from what I originally envisioned, or have been briefed to provide.

It has been my experience that taking the time to do this, in itself, sends a signal about the seriousness of your intent to make a difference. One senior executive from a global financial organization said at the start of programme on developing emotional intelligence, “I was heartened by the fact that you called beforehand to find out what was going on with our business and the team. It signaled to me that this wasn’t just going to be another course where you get put through a set process like some sort of sausage factory.”

**Design a development journey, not a development programme**

The metaphor of a development journey is more appropriate than the use of words like project, intervention, or programme.

Sustained behaviour change takes time. Yet despite overwhelming evidence that this is the case, most development programmes still fall in the 1–5 day category. While the notion that development should be an ‘on-going process of lifelong learning’ is widely espoused in development circles, in my experience, the development journey is not a mindset or practice taken by many clients or consultants. Instead, organizations lurch from one initiative to another, and consultants provide options that are difficult to integrate with past development efforts.
By thinking of development as a journey, both client and consultant remain open to the idea that lessons learned and insight gained on one leg of the trip can provoke what will be incorporated into the next leg. It also encourages the parties to think of themselves as travelling companions who can get to know each other better as the journey progresses.

Design with the future destination in mind

All development is an investment in the future. To that end, effective design depends on those involved having clarity and commitment to the future they are endeavoring to create. While this is easy to say, in practice, it is often very difficult to achieve.

In part, difficulty arises because individuals often struggle to articulate what they are committed to creating. With teams and organizations, this lack of clarity is compounded and a shared vision can be elusive. It doesn’t help that the world-view and language of the two parties (client and consultants) are often very different. While this difference is what allows value to be exchanged, in the early stages of development it makes conversations about desired outcomes and futures difficult.

Difficulties aside, one of the practical actions that I have found helps shape the design with the future destination in mind is to have discussions with the client regarding what success would look like in 2–3 years time (not just at the end of our contracted arrangement). By getting the executive team to identify what success would look like in 2–3 years time, everybody learns to focus on the factors that will determine on-going success. This prompts both the consultant and the client to make decisions that maximize the long-term benefit, not just short-term.

Design in ways that integrate with past initiatives

Many organizations have a history of lurching from one development initiative to another. For example, a client I have worked with recently has, in the past two
years, put people through a 2-day personality type workshop, a 2-day personal leadership styles workshop, an organizational culture assessment and debrief, a 2-day emotional intelligence workshop and is planning another 2-day leadership approach. Each initiative has its own language, set of diagnostic tools and perspectives on how leaders and staff add value.

While the organization sees this series of development events as a commitment to the development of its people, my impression is that the impact on staff is a growing sense that the organization is pursuing fads. In this case the whole development journey is less than the sum of the parts: and each new initiative takes greater effort for fewer gains.

With growing awareness of this phenomenon, a habit I have developed is to find out as much as possible about the previous development experiences the organization has undertaken, and explicitly work to link language and frameworks to work that has been done before.

In doing so, I have found that people recall little from previous sessions, and that few people are actively using the tools/frameworks from previous development to inform their practice. It seems evident that the sustainable way to get a depth of learning and behaviour change is for an organization to commit to a particular framework (and related assessment tool), and use this as the primary language for the development journey.

This is not to say the organization should be locked in to one consultant. Rather, there is a commitment to a coherent and consistent journey. If a particular language or approach is only going to be relevant for a few days, people will not bother investing time and energy in really understanding the framework being used.

Consultants act in ways that make this type of commitment difficult by insisting (ovely or covertly) that their frameworks are the only way. I have my own strong preferences and struggle at times with putting these preferences aside, but I do so knowing that frameworks are a means to having meaningful conversations which can catalyze action and engagement. Insisting that your model is the only sound way of moving forward does little to build on the investments made by the organization or contribute to a journey of shared development.
Ensure strong connections between marketers, designers and deliverers

When marketers and designers are disconnected, sometimes the solutions sold are either not the best possible option for delivering the desired outcomes, or that expectations created are difficult to deliver in the agreed process. When designers and facilitators are disconnected, often part of the passion for the idea (the “know-why” and “care-why” regarding the design) is lost, as is the ability to be flexible in the delivery of the material to meet the real-time needs of the people in the development process. At its worst, this disconnect results in facilitators who take an “off the shelf” product and faithfully work at delivering a scripted process.

In my experience, the real advantage of many of the smaller, boutique consulting firms, is that the marketer, designer and facilitator are often the same person. This gives a greater flexibility to the design and facilitation, as well as a stronger commitment to the ideas and learning environment one is working to create. Larger consulting firms need to work harder to ensure that strong connections exist. Because, whenever the connections are weak, explicit and tacit information that can inform the facilitation and design of the development journey gets lost.

CREATING PARTNERSHIPS FOR A DEPTH OF LEARNING

The expanding use of consultants as capacity builders shows the executives are well aware of the need for learning in their organizations. This awareness also needs to be matched by an understanding of the conditions necessary to create a depth of learning that will really make a difference.

Both parties must go beyond surface relationships and develop partnerships that address underlying assumptions and identity. This requires going beyond superficial issues of fit to allow quality conversations that ensure quality design and real change. Lessons learned about creating partnerships are highly personal and difficult to test, so in your own client-consulting relationships
make it your resolve to have conversations that allow you to learn about the
depth of your relationship and thereby have actions that increase the quality of
your partnership.

Further, if we are serious about achieving a depth of learning, we must
increase our attention on the design process itself. Rather than rely on packaged
solutions to issues and short-term interventions, we should focus on development
journeys that begin with the final destination in mind, and build strongly on past
development. The more we are able to do this, the greater our chances of achiev-
ing our desired outcomes.