Address Learning Needs, Not Wants

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Consider two views when engaging internal clients in needs assessment — what the client wants and what the client needs. The two may not align, and addressing needs is often more valuable.

Being a learning and development practitioner is akin to being a sales professional. Before offering solutions, practitioners must be sure they have all the relevant information. This could involve taking a series of required steps before providing the client with the appropriate solution.

The comparison applies in other ways as well. For instance, there are four critical skills common to both: earning the right to advance with the client; listening; assuming one already knows what the client needs; and importantly, helping the client to think differently about a situation by providing new insights.

What They Want

Consider this scenario. The phone rings. It is an internal client who sounds rushed and stressed, calling to ask how he can identify training solutions to teach his sales team ways to improve their closing ratio. Initially the learning leader's instincts indicate there might be more to this issue than just teaching sales people how to close new business. However, in situations like this pausing, suspending judgment, requesting more information and listening to the request are necessary.

After 30 minutes, the conversation ends, and it appears the closing ratio concern may be one part of a larger issue. It could be the business lacks a formal and well-articulated sales strategy. Without this critical component, training people on sales skills is only a short-term fix. Further, it is a potential waste of training dollars and time because it may not address the root cause of the performance gap.

There are essentially two views the learning and development professional should consider when engaging the internal client in a needs assessment dialogue — what the client wants and what the client needs.

What the client wants — results, performance change, a solution that is easy to access and use — can be relatively straightforward. What the client really needs — root cause analysis, organizational performance change and sustainability — takes more time, but can lead the way to the root cause of a performance issue.

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Addressing root causes results in lasting change. When clients see their staff not performing to the levels it should, they assume the staff lacks the knowledge or skill to do so. The value add of the learning and development professional is to help clients understand there may be organizational processes, structures or other restraining forces that inhibit workers from doing their jobs correctly and efficiently.

For example, consider the following scenario. An internal client can't understand why portfolio managers don't ask clients for business. The internal client thinks a training program will solve this issue. After speaking to several portfolio managers, however, it became apparent the portfolio managers didn't know they were expected to ask for the business. They thought they were expected to explain the features and benefits of the product, and the sales manager was expected to ask for the business. Clarifying roles and job responsibilities for both parties was the appropriate intervention, not a training program.

What They Need

The first step to build trust and rapport is to listen to the client to understand the initial problem. Learning practitioners should have an open mind and ask the internal client a series of open-ended questions — who, what, when, where, why and how. The responses will enable them to understand and frame the issue at hand. The relationship then can advance to develop the solution the client needs. By using the following four steps to engage the client in a collaborative problem-solving process, the learning professional can provide the client with what is wanted and needed.

Clarify what good performance looks like. Preparing performance-based questions is an important part of the needs assessment process. According to Dana Gaines Robinson and James C. Robinson's *Performance Consulting: Moving Beyond Training,* performance-based questions should focus on exemplary performers. For example, "Select your top salesperson. What does this person do when closing a sale that makes her successful?" This question will provide a set of specific behaviors from which a behavioral model can be constructed as part of the training content.

High-gain, performance-based questions to describe the current state include: What have you observed your sales representatives doing that has led you to conclude they would benefit from a training program? What are people doing that they shouldn't be doing as it relates to closing a sale?

Finally, there are restraining and driving forces questions that will help to identify the organizational, process and other non-training-related issues that will impact the participants' ability to apply the training. These question include: What factors will get in the way of participants applying what they learned in training? What factors will help participants apply what they learned?

Conduct the needs assessment. Conducting a needs assessment to determine the training and the non-training-related issues takes the initial request beyond a specific area or business and elevates it to the organizational level. The needs assessment process provides a legitimate business reason to interact with the client team and research the true nature of the gap across the organization. Much like peeling away the layers of an onion, uncovering the organizational issues associated with the lack of effective sales performance is a gradual process.

Start with relationships to build trust and confidence so the client will listen seriously to learning recommendations.

At this point the learning practitioner must manage the client's expectations about how long this process will take. It's better to put the time in on the front end of the process to avoid costly and time-consuming fixes. At the same time, when conducting the needs assessment, the client's original perspective is being validated while identifying additional performance barriers. In this way, the learning professional can objectively view the problem from different perspectives, which helps to develop recommendations the client might not initially see.

In Performance Consulting: Moving Beyond Training, the authors note that often the traditional training process confuses training activity with performance improvement. This is where the learning and development practitioner, taking a helicopter view, adds value to the diagnosis and solution design.

Further, the assessment process helps the learning professional build stronger relationships with internal clients, which leads to more benefits. For example, as Chris McCann, CEO of 1-800-Flowers, said during an episode of CBS' "Undercover Boss," "Build relationships first and do business later."

For learning and development practitioners, building rapport is just as important as it is in sales roles. Starting with relationships builds trust and confidence so the client will listen more seriously to learning recommendations.

Once the training issues are identified and rapport is established, the learning professional is in a better position to provide clients with what they want, as well as deliver the additional solutions they need.

Involve the client along the way. The next step is having the client become part of the decision-making process. This increases the client's ownership of the problem and solution. Clients who own the solution assume accountability for it, and they will ensure it takes root in the business. They also will realize and be more open to the fact that what they initially wanted may not be everything they actually need because what started out as a simple training need has taken on broader importance and scope.

In *The Challenger Sale: Taking Control of the Customer Conversation* by Matthew Dixon and Brent Adamson, the authors discuss how current market conditions and economic realities have shifted the sales model from one based on relationships to one based on challenges. Clients and prospects alike want to work with sales professionals who can provide them with new information and insights that will challenge their current way of thinking and doing business. Clients want people to educate them and help them think through business problems and solutions. Learning and development professionals should work with internal clients in much the same way. Asking high-gain, performance-based questions enables the learning professional to enter into a dialogue with the client to determine the types of performance support needed.

Provide data and options for the client. Facts and data to support the identified problem and recommendations will enable the client to make an informed choice about the appropriate solution to achieve the business goals. In going back to the original request for training on the topic of closing a sale, there are myriad solutions. However, clarifying the issues facing the business and the cause of those issues can facilitate efforts to provide the proper resolution.

With these four steps as guide, the learning and development professional's role cannot be underestimated. Learning and development practitioners play an integral role in managing the process as they identify the performance-related issues and potential solutions. They enable the business stakeholders to make informed decisions about what the solution will look like and how much it will cost. While learning and development professionals do this, they are also building a level of trust with their stakeholders, earning the right to advance clients in selecting the best solution from a range of possibilities.

As a result, the client obtains what is needed — a sales strategy and a consistent sales methodology. Once the sales strategy and methodology is delineated and implemented, the client also secures what he or she originally wanted. CLO

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