



Teaching Efficient Behaviours

Overview

In this case study Business Psychologists were retained to develop the consultancy skills of 48 Internal Consultants, employed by a national retail organisation with approximately 90,000 staff. Business Psychology models and methods were applied in the development approach, as well as in the Programme content, accounting for contemporary theories around how people learn and are motivated.

The Development Programme significantly increased the Participants' skills, enabling them to gain internationally recognised qualifications in Professional Consulting; and the organisation soon realised savings, covering the cost of the Programme.

Challenge

The internal Consultants addressed in this case study were responsible for ensuring the client organisation's democratic values were upheld and staff were effectively engaged.

These Consultants had decades of experience but no formal consultancy training or benchmarks. In a demanding financial climate, with many retail organisations struggling, the challenge was to up-skill the Consultants to nationally recognised standards.

It was intended that this would enable them to consult more effectively and so help the organisation maintain its competitive advantage.

The client had an idea of what they wanted to achieve but not what the solution would look like, so the Business Psychologists used a consultative approach to identify the need.

Challenges Identified

Four specific challenges were highlighted by the Practitioners' scoping work with the client.

- Participants were based throughout the UK, making face-to-face training inconvenient
- The 48 Participants had varying needs, meaning they required different Programmes of study
- There was talk of redundancies, which could impact Participants' motivation
- The Practitioners did not have a shared standard against which they could be benchmarked

Engaging with Stakeholders

The engagement process to co-create solutions included:

Phase One: Agreeing Need

- Week one: Stakeholder meetings, identifying business opportunities and presenting needs, setting timelines
- Week two: Administering Participant Needs Analysis Questionnaires (NAQs)

- Week three: Analysing themes from the NAQs, mapping the findings against Institute of Consulting programmes
- Week four: Proposing a solution to the client incorporating principles of Business Psychology to be applied, for review and agreement, and finalising implementation plan

Phase Two: Content and Structure

- Weeks four through seven were used to co-create solutions, the content and structure of the Programme

By working co-operatively on identifying problems and solutions, the Business Psychologists ensured alignment to the client's business brand (i.e. their democratic values), raised awareness of the underlying principles of Business Psychology, and secured commitment of all stakeholders to the Programme (Participants, Managers, and Human Resources).

Approach

Solutions were provided to each of the four specific challenges highlighted in consultation with the client.

Firstly, Participants were based throughout the UK. This meant that face-to-face training would be inconvenient. Applying the 70/20/10 formula (Lombardo & Eichinger, 1996), allowing people to learn from experiences and others as well as formal training, and Kolb's Learning Cycle (Kolb, 1984), which suggests that Experience, Reflection, Conceptualisation and Experimentation are all necessary, the team decided to use a range of methods in their design, including:

- Action Learning Sets
- Online tools
- Coaching
- Work application
- Reflection

Note from the Editor: although widely referenced, the work by Lombardo & Eichinger has been criticised. Experts suggest the precision of the model should not be generalised to all organisational contexts (Thalheimer, 2006. Kajewski & Masden, 2012. Clardy, 2018)

The second challenge to address was that the 48 Participants had varying needs, meaning they required different Programmes of study. Applying Schein's research into organisational culture (Schein, 1971), they grouped the needs of the 48 into themes, and mapped these to 10 different learning Programmes.

The third concern was that, as a threat of redundancies was imminent, motivation to participate may have been low if Participants viewed the Programme as only benefitting the organisation. Drawing on Dan Pink's writing on intrinsic motivation (2009), which suggested that people were innately motivated by Autonomy, Mastery and Purpose, the solution proposed was to frame the Programme as an outplacement opportunity that focused on the specific needs of each individual.

Finally, a standard which the Practitioners could use as a benchmark did not yet exist. This made it more difficult to ascertain whether Participants had the skills required to be effective Consultants, ergo whether they were valuable to the organisation. Appealing to the Mastery aspect of motivation (an individual's motivation to improve (Pink, 2009)), the Consultants

decided the Participants should all enter the accredited Institute of Consulting Programme “Award in Professional Consulting,” hence their capability could be measured while also developing as professionals.

The Business Psychologists additionally applied concepts of Behavioural Skills Training (Ward-Horner & Sturmey, 2012) by incorporating instructions, modelling, rehearsal and feedback into the Programme.

Setting Objectives

The Business Psychologists and the client agreed the objectives and key performance indicators (KPIs) for the project in advance, as follows:

- Objective One: Externally benchmark the department’s skills
 - Measure: Participants achieve the internationally recognised Institute of Consulting Award in Professional Consulting
 - KPI: 100% Participant completion and achievement of qualification within one year
- Objective Two: Participants apply their learning
 - Measure: Participants to make cost and time savings to the value of the cost of their participation in the Programme
 - KPI: Recoup 100% of the cost of the Programme within one year

Project Execution

The Business Psychologists followed a structured approach, using their Consultancy Cycle, to demonstrate best practice, ensure effective involvement of stakeholders and increase efficiency.

Entry & Contracting ⇒ Diagnosis ⇒ Action Planning ⇒ Implementation ⇒ Evaluation & Exiting

‘Entry and Contracting,’ and ‘Diagnosis,’ activities were described above. For the ‘Action Planning,’ ‘Implementation,’ and ‘Evaluating and Existing’ phases, the project followed the plan below:

- Programme design
 - Months one through three, client meetings and design of content and materials
 - Months four, seven and eleven had progress review meetings
- Program delivery
 - From month three, face-to-face training kicked off for groups one through five
 - Month four, face-to-face training kicked off for groups six through 10
 - Months five and six, independent study continued with workbook and online resources
 - Months three through seven, Action Learning Sets were facilitated for ten groups with three to seven Participants in each
 - Months four through eight focused on application of skills in the workplace
 - Month seven included face-to-face training follow up
 - Months six through ten required assignment writing
 - Months seven through ten included assignment feedback and coaching on application of skills
 - Months seven through eleven were used for submission of assignments to the Institute of Consulting for marking
 - Months ten and eleven delivered certification

Throughout the delivery of the Programme, the Business Psychologists kept in close contact with the client, giving and receiving updates on Participants' progress, successes and challenges in application of their learning. And the client organised administration of the Action Learning Sets, making time in Participants' schedules for these. This ensured support was provided for Participants throughout the Programme and kept all stakeholders actively engaged.

Business Psychological Applied

When designing the Programme, the Practitioners applied psychological models in the design of the Programme. This included concepts from learning theory, such as Kolb's Learning Cycle. This suggests, for effective learning, people need time to absorb new information, use it experimentally and integrate it with their existing knowledge. One may have an experience, or do something, and review or reflect on that experience. Then one draws conclusions, learning from the experience, and proceeds to experimentation, trying out what has been learned. As a result, one has new experience, recommencing the cycle. (Kolb, 1984.)

The Programme ensured Participants had opportunity to plan how they could integrate the new skills into their day-to-day work, to try out the new skills and to reflect on the results in both their Action Learning Sets and written assignments. By incorporating opportunities for skills practise in the Programme, the Business Psychologists applied the principle of Deliberate Practise in developing expertise (Ericsson, 1993).

Learning could result from formal training and development, learning through others, and job experiences/challenges. So, the Business Psychologists were keen to tap into all available channels when delivering this Programme, as follows:

- Formal learning:
 - Three days of face-to-face training
 - Workbooks for each Programme, containing information, models and theories relating to Consultancy, and exercises for application of skills
 - Dedicated online resource centre provided access to books, videos, podcasts, articles, journals, etc.
- Learning through others:
 - Participation in Action Learning Sets once a week
 - Telephone coaching with Coaches
 - Written feedback on assignments, on accuracy of knowledge and quality of experiences applying the skills
- On the job experiences:
 - Application of skills was required in order to write assignments and meet all the criteria set by the Institute of Consulting

The Business Psychologists also included psychological models and techniques in the content of the Programme material, so that Participants could apply these in their consultancy practice. For example, Cialdini's Principles of Persuasion (Cialdini, 2009), models for managing amygdala hijack (e.g. Goleman, 1995), and selective attention and perception (e.g. Pronin, 2007 and Lucas, 2009).

Additionally, drawing on contemporary theories of motivation from Dan Pink (2000), they incorporated:

- Purpose: people sought purpose, a cause greater and more enduring than themselves
 - The Business Psychologists emphasised how the Programme built upon the democratic values of the organisation and the mission to do the best for every single employee
- Autonomy: people needed autonomy over task, time, team and technique
 - The Business Psychologists involved Participants in the design and structure of the Programme and allowed individual flexibility in how they learnt and when
- Mastery: People were driven to get better at things
 - The Business Psychologists made time for Participants to develop mastery by facilitating activities to learn, practice and fine-tune their skills

Program Evaluation

The Kirkpatrick Model informed measures of effectiveness during the Programme. (Kirkpatrick, 1955.) In this case the measures included:

- Level 2: Learning
Months seven and eleven were used to evaluate knowledge increase
- Level 3: Application of Skills/Behavioural Change
Months six through nine were used for reflective statements on application of learning
- Level 4: Business Impact
Months seven and eleven addressed assessment of business impact and return on investment

To demonstrate the impact, written evaluation reports were delivered: an interim report in month seven and a final report in month eleven.

Outcome

The Business Psychologists observed that the Programme delivered against the required objectives.

Objective One

The objective was met in that they externally benchmarked the department's skills.

- Within just seven months, six of the 48 Participants had already completed the Programme and achieved the required qualification
- All Participants' submissions to the Institute of Consulting passed

This fulfilled the original objective for the department to have an external benchmark for their skills and for all Participants to achieve the internationally recognised Institute of Consulting Award in Professional Consulting.

Objective Two

The objective was met in that Participants applied their learning and recoup 100% of the cost of the Programme.

- More than half of the Participants had already reported that their level of knowledge/skill had significantly increased as a result of the Programme at the mid-

way point and this figure continued to increase through to completion of the Programme

- The majority of Participants reported that they could apply all the skills covered in the Programme, with all reporting that they were able to apply at least some of the skills covered on the Programme
- Specific examples of how this skill application benefited the Participants was also collected, including:
 - For the skill, “Techniques for identifying clients’ needs,” a Participant reported: “Knowing the best approach to take when identifying a client’s needs meant we achieved an understanding sooner and the intervention designed was immediately appropriate. This saved approximately two hours of client time and four hours of my time.”
 - For the skill, “Communication strategies for Consultants,” a Participant reported: “By analysing communication needs I was able to deliver a committee meeting via a vlog, saving three-and-a-half hours of everyone’s time. And by using communication technology effectively, I communicated via email and Google Docs to save printing costs of £1,500 per event”
- Business impact was recognised as all Participants reported that the application of their learning had resulted in time savings, with the majority reporting they had saved a “large amount” of time
- All Participants reported that the application of their learning had resulted in cost savings with half selecting “large amount,” when asked to indicate an appropriate description to the value of savings achieved
- Return on investment targets were exceeded. In fact, within just 24 weeks the savings achieved by Participants’ application of their learning had already covered the full cost of the Programme. In the first year, over 200% return on investment was achieved

The Business Psychologists report with some certainty that these results can be attributed to this Programme because the Participants did not undertake any other formal development activities during the Programme period.

Lessons Learned

From this project, the Practitioners learned that individuals’ needs and preferences (even those with the same job title) were diverse. It was however possible for all to reach the same goal, regardless of their preferred learning methods, abilities and work demands. That is, if Practitioners listened to the Participants’ individual circumstances and helped them plan the route to take. This may be more demanding and time consuming, but they observed that people who had ‘Autonomy, Mastery and Purpose’ were engaged and driven to reach their goal.

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