

You Can't Win Them All:
Lessons learned from a disappointing consulting experience

A few months ago I received a surprising, disconcerting, and overwhelming email. A month earlier I had given a three-hour presentation to a group of 15 senior managers from several different countries. My contact for this global company wrote, "Although they had a few take-aways from your session, the majority were very disappointed with the session as a whole."

When I asked for more specific feedback in a follow-up email, I received the following:

1) They felt they got "textbook principles rather than your experience," 2) "They were disappointed there was [sic] no real actions developed in the session," 3) "A number of questions were asked, but often not answered other than referring back to the principles," and 4) "We were paying you as a speaker and didn't appreciate the reference to available books, articles, websites, etc."

I have received the last criticism before, because I don't know how to refer audiences to my scholarship with a sincere motive to teach rather than "sell". However, this was the first time in more than 30 years of industry-based training and consulting a client indicated dissatisfaction with my service. Of course, it's possible other clients have been displeased with my performance, but just didn't have the courage to tell me.

As a result of significant contemplation and self-talk about this negative feedback, I've defined five lessons learned from this incident. I explain these below with hopes they may be useful to both consultants and to those who hire them.

1. Clarify Expectations

The facilitator of the safety-leadership meeting emailed me her desire that I teach people-based safety (PBS), and I had lengthy preconference phone conversations with the two most senior members of this group. These individuals informed me of the critical safety concerns of

their organization and gave me general direction on what to cover. However, we never discussed the desired deliverables from this session. What did the group expect to achieve from the three-hour meeting? I presumed the key outcome was knowledge gain, but I learned later they wanted an action plan. Consequently, I focused on explaining principles and procedures with reference to relevant case studies, instead of leading a discussion of people-based action-planning.

In addition, the expectations of a client can be unrealistic. In this case, the diverse cultures represented by the group participants would have made the development of a generic action plan impossible.

I believe some industry leaders expect experienced consultants to rapidly deliver a quick-fix magic bullet to solve their complex and multifaceted problem. And quite frankly, many of the promotional brochures from consulting firms give the impression they have *the* answer to occupational safety, organizational leadership, and culture change.

2. Know Your Audience

If I had received background information about each participant and had carefully studied these data, I could have customized a more pertinent presentation and facilitated a more applicable discussion. How much did the individuals already know about PBS? Had they ever attempted a behavioral observation-and-feedback process at their site? Had any read one or more of my PBS books?

If I had realized the cultural diversity of this group, and the aspiration for an action plan, I would have taken an entirely different approach to the group meeting. Actually, I would have insisted a company-wide action plan cannot be developed in a three-hour teaching/learning session, and perhaps not at all. I would have presented the relevant principles and offered advice for adaptations to particular cultures and injury-prevention circumstances.

3. Ask for a Process Check

Throughout my interactions with these corporate leaders, I assumed everything was going fine. The questions were thoughtful and expressed with genuine concern, and my answers appeared to be accepted. Moreover, several participants contributed examples to support pertinent principles or procedures; I had no idea the meeting was off the mark.

My mistake: I never stopped and asked, “Are we meeting your expectations for this session?” I didn’t even ask individuals this question during the lunch break. I just joined in the friendly conversations among the group members. No one raised a single concern that the session was not achieving its mission.

4. No News Is Not Necessarily Good

With no verbal behavior to suggest the contrary, I assumed my performance and the group discussion went well. At the end, I thanked everyone for the opportunity to share the essence of PBS with them, and I expressed sincere appreciation for their thoughtful questions and supportive dialogue. The friendly smiles and handshakes prior to my departure felt rewarding, signaling a successful teaching/learning experience for all. A month later I learned the session was judged a failure by “the majority” of the participants.

5. Solicit Immediate Post-Session Feedback

My good friend John Drebinger distributes his own feedback forms at each of his instructional sessions. He asks his audience what they liked best about his presentations and where there is room for improvement. He even uses his own feedback sheet at conferences that have their own evaluation process. In this way, John gets immediate impressions of a particular session. Such information is considerably more useful than the non-behavioral rating scores obtained months after a professional conference.

I wonder how many safety pros distribute evaluation forms at the end of their consulting or training sessions. And, how many clients ask their outside consultants and trainers to use feedback forms to assess their impact?

I received the negative email regarding my teaching one month after the three-hour session. The feedback had limited diagnostic value and came from one person, conveyed as a group opinion. How much more useful it would have been if I had distributed a feedback form at the end of my session, or better yet, during the mid-session break. Not only would I have learned each person's perspective, but I might have been able to make some on-the-spot adjustments.

In Conclusion

We do learn from the errors of our ways. I sincerely hope you view this confession of my unsuccessful consulting experience as relevant and constructive, and not an attempt to rationalize my mistake. Perhaps the need to clarify expectations prior to a consulting or training session is blatant, as is the value of a process check in the midst of a consulting meeting. Moreover, the utility of obtaining specific feedback regarding every participant's perception of a training event, including suggestions for improvements, is clear.

So have I only reminded you of the obvious? Whether consultant or client, you know you should perform certain behaviors relevant to each of the five lessons given above. But do you? Perhaps this personal story will convince some leaders to promote the obvious.

E. Scott Geller, Ph.D.
Alumni Distinguished Professor, Virginia Tech
Senior Partner, Safety Performance Solutions

Dr. Geller and his partners at Safety Performance Solutions (SPS) help companies worldwide apply human dynamics to industrial safety and beyond. Coastal Training and Technologies Corporation has published Dr. Geller's books on People-Based Safety, including his latest: *The Courage Factor*, coauthored by Bob Veazie. For more information, please log on to

www.people-based-safety.com; call SPS at 540-951-7233, or Coastal at 1-800-767-7703, ext 3313.