

Discussing three models of client: consultant collaboration for effective training interventions – a case study approach

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Abstract

Purpose – This article aims to draw parallels between literature discussing the benefits of management consultancy and three different role types adopted by consultants to provide an effective training intervention.

Design/methodology/approach – Using three case studies, it highlights the way each consulting model has been enacted by 20|20 to support its clients, all of whom are multinational businesses who invest a significant proportion of their annual budgets on industrial training.

Findings – The relationship between a consultant training provider and client is critical to the success of any training intervention. Linked to this is an appreciation of the cultural differences to be found within any single client organisation. For some organisations, this difference begins with the way training itself is defined, and even whether it is a part of the wider organisational identity and communications vocabulary.

Originality/value – As this article illustrates, the provision of industrial training is so much more than the ostensibly “checkbox” exercise of simply imparting functional knowledge through a standard set of courseware. Successful training interventions require a cultural approach to be taken in order to achieve their full potential.

Keywords Case study, Project management training

Paper type Viewpoint

Introduction

The relationship between a consultant training provider and client is critical to the success of any training intervention. Linked to the development of a strong working relationship is an appreciation of the cultural differences to be found within any single client organisation. For some organisations, this difference begins with the way training itself is defined, and even whether it is a part of the wider organisational identity and communications vocabulary. As consultants, in addition to helping to impart professional knowledge, our role is to adapt the style of working to suit each clients’ specific requirements. This article draws parallels between literature discussing the benefits of management consultancy and three different role types adopted by consultant to provide an effective training intervention. Using three case studies, it highlights the way each consulting model has been enacted by 20|20 to support its clients, all of whom are multinational businesses who invest a significant proportion of their annual budgets on industrial training.

The benefits of external specialists in a training context

Observing some of the literature discussing the role of management consultants, one can draw similar conclusions about the ways training consultants can adapt their working styles and the benefits this can bring to an organisation.

Commenting with the provision of benefits initially, Drucker (1979) suggested that management consultancy as an industry exists because “the relevant skills, techniques

and knowledge are best learned through previous exposure to and experience with many different industries". Compare this with an internal management executive who may also have the requisite professional knowledge but "lacks exposure and can neither gain nor simulate it".

In addition to their professional "knowhow", training consultants provide more objective insights into solving management problems. Empirical research verifies that clients value the contributions made by outside consultants because they help to generate new ideas, offer higher levels of proficiency in their subject areas, and bring a level of impartiality and objectivity which they cannot obtain internally (Gattiker and Larwood, 1985; Canback, 1999).

Management consultants McKinsey & Company validate this with their six reasons to explain why hiring an external consultant makes sense in many situations. These range from providing competence not available elsewhere; bringing a variety of experiences gained outside the client; having a greater availability of time to study problems; professionalism, organisational independence and a greater degree of perceived authority. Typically, recommendations offered by external consultants tend to carry greater currency within organisations than when the same advice is offered by internal sources.

Whilst these references originate from work undertaken to understand the practice of management consulting, it is reasonable to apply the same logic to training consultants and draw parallels with the provision of industrial training accordingly. Indeed, from our own anecdotal evidence working in industry, we know clients frequently cite the variety of exposure we as external specialists bring, as a key reason why they outsource professional training to us as external providers. Other organisations clearly share this thinking about perceived value add and it has helped to create an industry worth in excess of £3 billion annually.

The cost: benefits of outsourcing specialist functional training

Project management training in particular is a highly specialised area of functional training and one most likely to be delivered by dedicated specialists.

As the training consultancy industry has developed and grown, it has also fragmented and specialised, with many providers now offering very specific vertical market experiences in addition to functional, discipline orientated knowledge. This provides an additional layer of effectiveness to the outcomes of an industrial training intervention and is of particular relevance to clients investing in functional training like project management. Again, academic work (Canback, 1999) verifies what we as niche training specialists have understood from the outset, when he suggests the many opportunities that exist for consultants to bring perspectives gained from other industries. Canback (1999) argues that external consultants can be "cost effective, available, and adept at understanding their clients problems and circumstances". Our experiences and the feedback we receive from clients, certainly validates this thinking.

Using a case study approach to interpret Schein's models of consultation

When working with clients, it is necessary to adapt the training consulting style to reflect the objectives of each project. Again, turning to the management consulting literature for inspiration, Schein (1990), has identified three broadly accepted models of consultation, each of which brings about a different relationship between the client and consultant. These are:

1. the straightforward purchase of skilled expertise;
2. the doctor-patient relationship; and
3. consultation to effect process improvements.

Three client case studies which highlight the extreme variety of briefs undertaken by 20|20 can be used to illustrate how Schein's models apply equally to functional project management training and consulting assignments. In each case, the assignments were successful in bringing about the desired change required by the client, e.g. development of consistent levels of project management expertise or a consistent framework of project management processes.

“In addition to their professional ‘knowhow’, training consultants provide more objective insights into solving management problems.”

Model 1: purchase of expertise

First, in the case of “purchase of expertise” model, 20|20 has supported The AMEC Academy as part of an ongoing industrial training programme. AMEC is one of the world’s leading engineering, project management and consultancy companies and employs 29,000 people. The company works with customers in challenging environments across a very wide range of industry sectors and wanted to ensure its project managers, project controls specialists and project-based engineers have achieved a minimum level of competence. The AMEC Academy was launched to help realise this ambition, by providing company-wide training programmes for ongoing talent development, all managed centrally by AMEC’s own talent development specialists within The AMEC Academy.

Quality assurance “kitemark”

In this scenario relevant to consulting model 1, the client, AMEC, was looking for its training partner to provide an independent perspective to address particular challenges at hand. 20|20 worked in partnership with AMEC to design and deliver global programmes for project and engineering managers as part of a sustainable education programme for AMEC’s international project managers-based across three continents. Specifically, AMEC wanted to be able to confidently assign each of its project managers with a quality “kitemark” in order to reassure clients outsourcing projects to AMEC, of a consistent level of competency, regardless of industry sector and geographical location.

To date, over 300 project managers have attended and completed the AMEC project management professional (PMP) development programme which means AMEC can reassure customers worldwide that all its project managers, project controls specialists and engineers are highly competent experts in their respective fields and have the skills and knowledge to deliver professional services in a consistent way, backed by the internationally recognised APM Level D or PMI’s PMP and certificated associate project management (CAPM), depending on experience. It was also important that course content was adapted to be relevant to AMEC’s specific industry requirements and, in the UK, to comply with the recommendations of the ECITB (engineering construction industry training board).

Illustrating the nature of the “purchase of expertise” model, AMEC specifically engaged 20|20 as its training consultant because of the company’s extensive experience working with other clients in the same industry sectors – renewable energy, construction, mining, oil and gas, plus nuclear. In addition, 20|20 had the specialist knowledge to be able to tailor course content specifically for AMEC’s own business processes. Undertaking a global training development programme across so many continents can be costly and a further way 20|20 demonstrated its specialist expertise as consultants was helping AMEC to identify a way to ensure the sustainability of training initiatives through obtaining ECITB rebates.

Results achieved for model 1

Results from AMEC’s own feedback, based on a two-phased measurement, showed this approach worked very well. Traditional delegate satisfaction questionnaires completed immediately after the training interventions showed immediate impressions of the course were very positive. More importantly, three months after attending 20|20’s programme, delegates and their line management were profiled again to ascertain the extent to which they felt the developmental programme was beneficial. The findings from this showed that 97 percent delegates were successfully applying the knowledge learned and showing enhanced effectiveness and value add, on a business and personal level, which was reported by both delegates and management.

Model 2 case study: doctor-patient at Magnox

Second, Schein's "Doctor-patient model" describes the role of the consultant when focusing on using a diagnostic approach to examine a client organisation's problems. In this situation, the consultant uses its distinct experience, knowledge and diagnostic abilities to identify solutions to strategic and organisational problems. To illustrate how model two applies in practice, 20|20 worked closely with Magnox, helping the organisation to achieve corporate APM accreditation and comply with legal requirements in record time. To be successful, this model emphasises the importance of building strong relationships and developing trust between client and the consultant, which is evident in the feedback obtained from Magnox.

Magnox is the management and operations contractor responsible for ten nuclear sites and one hydroelectric plant in the UK. In recent years, the company has moved from a focus on generating power to becoming a decommissioning company and strong project management skills have become central to daily operations for its employees. To further emphasise the importance of project management for its business objectives, Magnox appointed 20|20 as consultants to help it achieve corporate APM accreditation quickly and confidently. A key part of this assignment involved 20|20 supporting Magnox through the substantial corporate APM application process in which the company needed to demonstrate its commitment to project management excellence and formulate appropriate measurement criteria for monitoring ongoing learning and development.

The nature of Magnox's business means that its project managers are working in a highly regulated environment similar to oil and gas, but with the added potential hazard of radiation contamination. Over the past two years, Magnox has completely realigned its capability and performance measurements, to place greater emphasis on project management.

Training investment would lower costs

Expenditure on the company's decommissioning activities was estimated at around £700 million for the 2012-2013 financial year. With such high levels of investment at stake, delivering projects on time and within budget is a business priority. The total expenditure originally estimated by Magnox to deliver the MOD programme by 2027 was £2.4 bn across all sites, a figure which could be significantly reduced with effective ongoing project management. This is because the quicker Magnox can decommission sites into the care and maintenance phase, the lower the costs incurred from keeping these sites open are, and the case for building new nuclear power facilities is made stronger.

To commence the accreditation programme, 20|20 first completed a comprehensive review of all existing project management processes including a gap analysis against best practice, recommendations and provision of missing elements where applicable. Magnox then needed to prove they had suitable training plans and competency frameworks for staff and provide further information on their future plans.

Magnox launched a company wide project management learning and development programme for its project management and project planning community. Since a number of Magnox partners and competitors had already achieved corporate APM accreditation, including AMEC, with whom the company shares resources, it was important for Magnox to have a consistent approach and demonstrate the same level of competence. Added to this, having the corporate APM accreditation is an important element of staff development and future career planning for Magnox. This is because it allows project-based employees to transition from the company to new opportunities within AMEC or other strategic resource partners, once decommissioning is completed at a site.

Results achieved with model 2

To measure the effectiveness of this project, Magnox developed a two-pronged approach to competency measurement examining individual and organisational capabilities. At the individual level, the company developed technical and behavioural competency feedback assessments for its community of project managers to identify how well they score for capabilities. These are then mapped to correspond with the 47 technical, behavioural and contextual competence elements specified by the APM. This was combined with company wide reviews to measure the extent to which projects were being delivered in an innovative and efficient way, and to examine where the business benefits most from having invested in the programme.

20|20 were successful in supporting Magnox through the corporate APM accreditation process and the company was able to achieve its accreditation in the shortest possible timescales. One development which indicates how this approach has helped to contribute to organisational goals has been the extent to which Magnox has been able to reduce its original cost estimate to complete the entire decommissioning works across 11 power stations at a forecast value of £1.2 billion, representing a 50 percent potential saving. This clearly demonstrates the financial impact good project management has within an organisation. Looking ahead, Magnox intends to take a random selection of projects in order to benchmark efficiency levels as a result of corporate APM accreditation. The company hopes to achieve at 5 percent improvement to efficiency levels but is confident this may be more, exceeding the expectations of the nuclear decommissioning authority.

Achieving corporate APM accreditation is a complex and lengthy undertaking and 20|20 played a clear “doctor-patient” role in guiding Magnox towards achieving its APM accreditation in the fastest possible timeframe.

Model 3 case study: process consultation with Centrica energy

Finally, the third model, “process consultation” shows the consultant as a facilitator, with the client actually providing some of the relevant expertise to implement the results. Here there is a clear distinction of roles and tasks and the client actively chooses their desired solution to the problem. In this model, the role of the consultant is to provide more of the framework and methodology for defining the problem and best possible alternatives.

Training consultancy undertaken for Centrica energy over a number of years illustrates how this model can be applied in practice. Here, 20|20 helped to facilitate a benchmarking process being undertaken by Centrica energy to assess its project management competency levels and develop a single, organisation wide framework and supporting documentation for project management processes. In this instance, Centrica energy needed to join two disparate project communities and start working as a single team with one common governance set outlining standard processes and practices.

Facilitating a single project management worldview

Over a three year period, 20|20 provided a wide range of project management consultancy services, professional competency assessments and training services to Centrica energy's upstream and renewables divisions. One of the outcomes of this ongoing working partnership has been the ability for Centrica itself, facilitated by 20|20, to develop a standardised project management worldview and governance model based on current best practice and to ensure that its PM professionals are fully equipped to cope with the emotional demands and intellectual rigour required to manage complex, high risk project portfolios for a world class energy management business.

The need for Centrica energy upstream to standardise on a single project management governance process arose because the company recognised that following the acquisition of venture production plc, many practices, policies and experiences had come together from the previous parts of the business into the new single entity that was Centrica energy upstream. As is frequently the case following mergers, the resulting entities experienced project management efficiency and effectiveness issues caused by process duplication. To resolve this, the company's management team integrated two disparate project management frameworks into a single set of processes and methodologies based on best practice guidelines.

As part of their role in this brief, 20|20 assisted Centrica by facilitating workshops in March 2011 to help the company's project management team develop a common “stage gate process” supporting the creation of a single project delivery process with a single project lifecycle and unified governance standards. Bringing two teams together presented a challenge because it involved combining fundamentally very different ways of working, which included appetites for risk and a cultural approach to project management. One team was structured and worked according to a very traditional mode and the other in a very different way, which meant approaches from start to finish were always varied, yet we needed to be a single unified team. By consolidating the different project management “worldviews”, Centrica could at the same time, identify how newer, cutting edge practices

being adopted elsewhere in other organisations could be employed internally. Their aim was to agree a standardised approach to ensure commonality both across investment decision-making and progress reporting.

The result was a single project lifecycle created by effectively cherry-picking the best bits from multiple methodologies. This was overlaid onto Centrica's existing knowledge of project management best practice, allowing them to continually validate what was being proposed against international standards. After the exercise, Centrica's management team verified the important role 20|20 had played to provide both an independent viewpoint and guidance to establish a central governance model.

Conclusion

As this article illustrates, the provision of industrial training is so much more than the ostensibly "checkbox" exercise of simply imparting functional knowledge through a standard set of courseware. Successful training interventions require a cultural approach to be taken in order to achieve their full potential. The diverse world of the training consultant and the briefs they receive have more in common with management consulting, whose literature provides interesting parallels through which we can gain a deeper insight into both the needs of clients, and the result which can be achieved.

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