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ABSTRACT

The professional instructional designer frequently develops instruction for someone else--an outside client, another department of his or her organization, or colleagues who have content knowledge but lack specific instructional skills. The role of consultant poses unique hazards and opportunities, as it requires the use of relationship and interactional skills quite apart from the instructional skills in which the instructional designer may be trained. Crucial issues include credibility, impossible or inappropriate demands, vague goals, and "techniques first, objectives later." Some useful techniques for dealing with these problems include assertiveness, strategic control of information, doing one's "homework," attending and focusing on the client as a person before focusing the problem, reflecting and summarizing, and focused questioning. (Author)

THE INSTRUCTIONAL DESIGNER IN THE ROLE OF CONSULTANT: PROBLEMS AND STRATEGIES

by

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The defining characteristic of a consultant is not that he or she commands a high fee, but that people come to him or her to use his or her expertise. The client may come from within the consultant's organization of from outside. The point is that the consultant knows how to do something, and that he or she has been targeted by the client as the person to perform a task.

Except for those of us in full-time teaching positions, instructional designers are usually in the position of creating instructional plans for someone else, either an outside client or a member of our own organization who does not have instructional development skills. Dealing with a client in planning and negotiating the assignment calls for a set of skills which are entirely separate from those generally used in the design of instruction. In order to be effective in the interaction with the client, the instructional designer must be prepared to apply relationship and interactionally-oriented skills which may be outside the domain of his training.

Specifically, this paper will focus on the task of relationship-building between you, the instructional designer and your client, the person who is coming to you for services. The foundation for this relationship needs to rest on at least two things: trust and respect.

Ther are several different aspects to trust. First, the client needs to be able to trust you, the instructional designer, to be able to actually create an instructional plan.

Second, he has to trust the whole instructional design technology. The client who needs a hard (as opposed to soft) task taught --running an industrial machine, for example-- may be more open to a scientific approach to training than , for example, a social work supervisor, who may present as an objective that his or her workers be trained in "disciplined use of self.".

Third, the client needs to trust our reliability, not merely that we will bring the project in on time, but also that the effects of the program are what was wanted. Finally, the client needs to trust our sensibilities. In the initial stages, the client is going to be detailing the problems in his organization, the "mess" that you are to help them get out of. It's difficult to detail your failures to someone you don't trust.

The second base is mutual respect: that the client respect the instructional designer as a professional and that the instructional designer, on his or her part, respect the client.

PROBLEMS

For the purposes of today's discussion, I'd like to suggest four problem areas that instructional designers frequently face. These may not be comprehensive, but they are typical.

First, the issue of credibility. I mentioned earlier that some clients may not believe that scientific instructional design is the right thing for them. Clients, especially first-time clients, and very especially clients who are experts in their own specialization, sometimes seem to have difficulty in trusting an instructional designer to know what he is doing or to be able to design instructional sequences for subjects in which he is not personally expert. This phenomenon is probably worse the farther afield the subject matter is from the psychological and educational knowledge and skills we claim as our own specialty, but I have also encountered it in a situation where my skills in the subject area were at essentially a professional level. This was, of course, a power and control issue, not an instructional one.

A second problem we face is being asked to do the impossible or the inappropriate. By this I mean being asked to deal not only with problems that are not instructional, but also with problems that are not solvable or which may not even be problems.

Third, the client who comes in with a lack of clear goals for the instruction. Note that I didn't say clear behavioral goals, because I don't believe we can expect a client to come in with neat goals that Bob Mager or Steve Yelon would award a gold star. More often, the client wants things "done more professionally around here," which may or may not be an instructional problem. Our first problem, though, is to find out what his problem is.

Finally, the problem posed by the client who saw this great instructional technique used up in Minneapolis last month, and wants something just like it for the local staff. The problem arises from the fact that the super technique in Minneapolis was (we hope) designed to deal with a specific instructional problem for a specific group of people at a specific time and place. That problem, for them, then, and there. It may be that the needs and problems of our people, here, and now, are quite similar to their's, but we don't know that yet. We'll refer to this as the technique first, objectives later problem, or "putting the charts before the course."

STRATEGIES

Now let's go on to discuss some of the strategies we can use in dealing with those problems. Most of these concepts come from the familiar assertiveness and communications skills areas; the current task is to translate these into the novel context of the consultant and the client. Remember that we are interested in building a relationship based on trust and respect, and that the main roads to trust and respect are openness and honesty. We need to foster these in ourselves and in our clients.

The underlying rationale is two-fold: First, that we, as instructional design professionals, have valuable expertise that the client does not possess. If he did, he could write his own training, but he has chosen to come to us. Second, that in the initial stages of the process of negotiating for an instructional design for a client, our job is to discover what needs to be accomplished. If the client does not know this information yet, we can be of considerable service by helping him figure our what he wants. This is an information processing function, using the techniques of active listening, inference, and reflection.

The first problem I noted was the one of credibility. To me, credibility and trust are closely associated. If you trust someone, you can believe in him and his abilities. A credible person is one who can establish a presence in the interaction, by being assertive and outgoing. Being assertive and outgoing does not mean monopolizing the conversation; it does mean having something to say.

Probably the best way to be sure of having something to say is to have done some homework. It's rare to have to meet with a client absolutely cold; one usually has some advance notice, like "We'd like to come by next week and talk to you about designing some computer literacy courses for us."

Given that much warning, one has time for some digging. A trip to the library (or one's favorite local expert) to do some proactive research (which will have to be done at some point anyway, so it's not extra work) might focus on the following questions:

1. What are the basic concepts in computer literacy?
2. Who are the standard authors? (Papert, Brown, Luehrman, etc).
3. What are the hot issues? (e.g., Do you need to be able to write BASIC code to be computer literate?)

This background research enables one to have some ideas, some opinions (not too rigid, of course; the client want's his biases transmitted, not the instructional designer's), and also some intelligent questions for the client. For example, "Are you mainly interested in people using computers in your organization, or would you be looking for them to develop new ways of dealng with information, as Papert suggests that they might?" The purpose of that question, of course, is partly to discuss the goals of computer literacy, but also to establish yourself, not as an expert, because you aren't, but as a person who can get at the essential ideas in a subject area and who is able to ask the right questions.

In addition to demonstrating that you have some ideas about the client's subject and what might be done with it, it is important to establish your track record, to "present your portfolio", as a visual artist might put it. If you have worked with this population or this subject matter before, say so. If not, mention projects that you have worked on, especially important and/or particularly successful ones, that resemble the current project in relevant ways. Maybe you haven't done computer literacy training, but you have had experience in office automation, which is another form of people interfacing with digital machines. Make it clear that you have had prior experiences that have given you useful background to help meet the client's needs.

Finally, there is the element of enthusiasm. A consultant who is enthusiastic about a client's ideas communicates that he is ready to become involved with the project and work hard at it. An unmotivated consultant, on the other hand, won't be trusted to motivate trainees.

Let me emphasize that this establishing credibility step is not done merely for the purpose of selling yourself or getting a contract for your business or your division. In order for you and your suggestions on instructional design to be taken seriously by the client, you must first establish yourself as the experienced, competent professional you are.

Now that you have established credibility, you can go on the the process of identifying what it is that the client wants done. It is here that one encounters both the problem of the impossible demand and the problem of the lack of clear goals. In many cases, the former arises from the latter, since when a client, for example a manager, only knows that "something needs to be done," he will often automatically decide that the "something" is instruction.

The process called for here is not so much instructional design as problem analysis. Some of the relevant questions are:

1. What is the problem? What is the discrepancy between what is and what should be? For instance, to continue our computer literacy example, the instructional designer might be told "Our people don't know anything about using computers." This is probably a statement of fact, but we still need to know how much they need to know. A related question that provides a measure of the seriousness of the problem is "How much is it costing us?" Is the organization losing money because people are trashing invoice records on the computer, or is it missing accounts because it doesn't have any computer capabilities, or is it simply that knowing how to use computers is the mark of the educated gentleperson of the 1980's? The answer to this second question will provide information about another question: "Is this a problem we need to solve?

2. Whose problem is it? Methods like Tom Gordon's Effectiveness Training place a lot of emphasis on the ownership of problems. The owner of a problem is the one who is concerned about it, and probably the one who's responsible for paying for it. Sometimes just making everyone aware that a situation is a problem for someone is enough. Does the staff complain of a lack of computer

skills, or only the office manager? If the latter, how can he get them to share the problem with him?

3. Whose behavior needs changing? Sometimes you can change the needs of the owner of the problem, but more often you need to target a population.

4. What are the behaviors that need changeing? This is a deceptively difficult question, as we all know. I'm sure you're familiar with the episode reported by Robert Mager in which he helps phone company supervisors define what it is that they want their operators to do differently. Frequently, the instructional designer is placed in the position of having to do exactly what Mager did.

5. Are those behaviors changable by instruction?

Once these questions are answered, we are back in the realm of instructional design, and you know the skills you need to use. But what are the skills you will use as a problem consultant?

Let me begin by saying I'm not suggesting you become a counselor , but some of the techniques of the problem consultant are the same ones a counselor uses: attending, empathy, reflection, and summarizing.

We're defining your job at this point as helping your client figure out what his problem is, and what needs to be done. You need information from him, lots of it, and you need to show him you're hearing what he says, that you're attending to him, as the counseling people put it. You demonstrate attending in several major ways: eye contact, body posture (open, forward-leaning, oriented toward the speaker), and prompts ("Um-hmm", "Mmm", "Okay", "Go on", etc).

A necessary companion to the physical attending discussed above is psychological attending: tuning in to what is going on and not being preoccupied with other thoughts. What you tune in to may vary, though. Early in the relationship, while trust and respect are still developing, it may be more important to tune in to the client himself, as a person bringing you a problem, than to the details of the problem situation.

A word of caution: Don't overdo it. Your client is looking for help with an instructional (you hope) problem, not an emotional one, and may feel threatened or turned off if you come on as if you were Eric Berne. Aim for congruence with your client.

Most of us know what empathy is (and it's not the same as sympathy). People mostly talk about emotional empathy, the ability to experience another person's emotions as if they were your own. Cognitive empathy, which is the ability to infer what the client is thinking, based on what he says -- and doesn't say, how he acts, his tone of voice, etc., is the ability to follow another person's thought processes as if they were your own. The "as if" is important, because you need to be able to retain your own opinions and cognitive processes to evaluate what you're being told. You need to be able to follow the client's train of thought, reach the same conclusion that he or she did, and then decide whether the process and destination are valid.

You let the client know you are cognitively empathizing through reflection, e.g., "As I understand what you're saying, the skills you're interested in developing in your staff are word processing and data base management, but you also think they should know some BASIC, because programming helps them think clearly, right?" or "The problem is that the staff is playing Frogger, and you want them to be running Wordstar, is that it?" This asking for confirmation is very important, because it is essential that you be clear on your client's conception of the needs and goals of instruction.

A final skill area here is summarization, which means that periodically throughout the interview and again extensively at the end, you provide an overview of the discussion, listing what you perceive to be the crucial points. This does several things: first, it shows that you are paying attention; second, it helps you keep track of the conversation; third, it provides feedback to the client, so that he can monitor what he is saying; fourth, it provides the basis for a contract (in the interactional, not the legal, sense) between you and the client.

Let's now consider the "charts before the course" situation. Your client has been to a computer literacy workshop in which everybody learned to use spreadsheet calculators by playing an arcade game called AlienCalc, and wants an instructional program just like it for his staff. This set-up presents a real dilemma. On the one hand, one can follow the standard precepts of instructional design, insisting on needs, then goals, then objectives, then instructional design, then techniques, but to do so risks communicating to the client that you are not interested in his situation or his ideas. On the other hand, one can capitulate to the client's infatuation, and structure the training around a certain activity or piece of hardware or set of materials, knowing full well that one is engaged in entertainment, not instruction.

I'd like to suggest a middle ground. Listen to all the client has to say about the wonderful technique, use focused questioning to pull out more details about how and why, and reflect it all back to him/her. But, in the reflection, be sure to reflect what you've found out about the reasons the technique was used, and the goals that were to be accomplished.

At this point, you will have led the client to an assessment of his goals for his audience, and can begin to ask the payoff questions. Sometimes "admitting" confusion is a useful tack, e.g. "I've been listening to you telling me about how and why this technique was used in Minneapolis, and I'm sure it was super, but I'm having trouble translating it to the local situation. Are you saying that your goals for your people are the same as their goals for theirs?"

Of course, it may be that they are. Then again, it may be that they aren't, and if so, the bottom-up design that the client wants you to use may not be very useful. By now, though, you have made it clear to your client that you are listening to his ideas, and he may be more open to your suggestion that you "start with what we want the trainees to learn, and then see what will be the best means of doing that."

CONCLUSION

The underlying theme of what I have been talking about here is the strategic control of information. In dealing with the credibility problem, the instructional designer makes sure he has a grasp of a certain set of information about his own qualifications and about the subject and population proposed for the training, and makes sure this iformation is transmitted to the client. In the other three situations discussed, the instructional designer is engaged in facilitating the transmittal of information from the client, and is using interactional skills of attending, cognitive empathy, reflection, and summarization.

The use of these skills, however, is itself a way to transmit two messages to the client: "I am working hard to understand your needs and your ideas" and "You can trust me." If this information transfer is successful, it provides the essential foundation for a productive consulting relationship between the instructional designer and his client.

Note: The current version of this paper includes ideas brought up by the participants present when it was delivered in Atlanta. Their contributions are greatly appreciated.