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Fall has arrived in New York; and the NY Metro chapter is now back in full swing.

Our kick-off Fall September chapter event : “A Professional Trainers’ Dialogue: Managers and Consultants” was well attended by long time chapter members as well as many new to the chapter. Six panelists shared their experiences working with, or as, consultants. A report of the panelists’ discussion on developing good relationships between internal managers and external consultants is included in this issue.

This issue also includes an article by an external consultant on a sometimes neglected topic, that of preparing the Trainers’ Guide, when designing a training program. Judy Steele shares her best practices in this area.

Take advantage of all that is available now. Please be sure to check our redesigned chapter website and our many ongoing networking meetings, and special interest groups and monthly chapter events!

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Chapter News

September Event Report: A Professional Trainers' Panel with Managers and Consultants

By Matthea Marquart, Chapter Event Reporter

The September ASTDNY chapter event, **A Professional Trainers' Dialogue: Managers and Consultants** featured a panel of professional trainers talking about the relationship between internal managers and external consultants.

The six panelists included **Leslie Bobrowsky**, President of Specialty Training Services, a firm that provides training and consulting on professional skills; **Andrea Elkin**, Managing Director of Branch Manager and FA Development at UBS Financial Services; **Dr. David Guralnick**, President of Kaleidoscope Learning, a company that provides course development software and e-learning consulting services; **Jeffrey Kuhn**, Vice President of Leadership and Learning Practice at Peer Insight, a company that consults on in-company leadership and executive development programs; **Mark LaRocca**, Director of Technology Training at Ogilvy & Mather North America; and **Dr. Carol Robbins**, Director of the City University of New York Off-Campus College Program with the School of Professional Studies, which serves working adults pursuing college degrees.

The panel was moderated by **Dr. Nancee Bloom**, ASTDNY's VP of Membership and Director of Training Resources at the Bloom Business Center; and **Judith Steele**, a training consultant specializing in instructional design and workplace learning.

The panelists talked about three major themes: establishing a positive professional relationship between internal managers and external consultants, sustaining the relationship with open communication and a shared spotlight, and specific challenges and best practices.

The panelists stressed openness, honesty, and up-front communication in the beginning phase of a working relationship, Elkin pointed out that "there is no such thing as a smooth project" and that "70-90 percent of the time there's not enough time or resources built in". This means that before any project begins, it is critical to establish the course of action to be taken when a problem arises. Guralnick added that setting expectations is key – in particular establishing the consultant's and client's roles in the project – and can begin even before the project is assigned. When establishing roles, Kuhn promoted a "co-creation model" for projects, in which the internal manager and external consultant

work together to create the end product. LaRocca noted that internal managers need to communicate the reason for hiring a consultant, whether because outside expertise is needed or simply because no one internal to the company has time to complete the project. Robbins highlighted that the consultant and client need to determine that they have a shared philosophy about the project. Her message to consultants was "go with the work that most excites you and convey your passion. Be as authentic as you can be because then the relationship will blossom."

As the working relationship continues, the panelists emphasized also the continued importance of communication. Bobrowsky stressed that expectations for the project need to be continually set and reset, and that where a training consultant finds that training is not the called-for solution, it is important to act with integrity by pointing out the non-training solution. LaRocca underscored the importance of telling the other party as soon as it becomes evident that someone is going to miss a deadline. Elkin said that consultants need to establish multiple forms of communication, in particular doing something that stands out. She shared two samples of effective communication that gets attention and results: a weekly project newsletter with updates and descriptions of roadblocks that is sent to everyone involved in a project, and a "brag report" that color-codes elements of the project with green for smooth elements and red for elements that need help.



Kuhn drew attention to the value of creating win-win scenarios, mentioning that when work is co-opted on either end, it can destroy trust and damage the working relationship.

Elkin pointed out that when consultants put the spotlight on the internal person and make them look good internally, it builds relationships and contributes to continued collaboration. Guralnick recommended keeping in mind that everyone has the goal of doing a quality project.

As the discussion neared the end, the panelists shared specific ongoing challenges and best practices from their experiences as clients or consultants. Bobrowsky mentioned that projects are often delayed by contracts being stuck in the legal department; Elkin shared the best practice of consultants requesting to view a standard company contract as early in the project as possible, or saying that "many clients have the standard practice of signing a non-disclosure document," which gets paperwork

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Chapter News

Professional Trainers' Panel

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started as soon as possible.

Staff turnover on the client side was a common problem for consultants. Guralnick mentioned a project in which due to significant turnover, after one phase had been completed, his organization decided to step down from the project because they were no longer a good match with the client's philosophy toward the project. Robbins pointed out that in order to mitigate the impacts of turnover, consultants need to build loyalty within the department and/or company, not just with an individual clients.

The panelists had several responses to an audience question by ASTDNY President-elect Kathy Meany, who asked about the challenge of working with consultant companies who impress corporate managers with their account representatives, but whose trainers do not deliver the end product training as well as was expected. Suggestions included asking for trainers to be identified early in a project and then going to observe them, getting a detailed description of exactly what will happen in a training class, and getting recommendations about trainers from people you trust.

Matthea Marquart is the Director of Training for Building Educated Leaders for Life and has been an ASTDNY member since 2006.

"Being happy doesn't mean that everything is perfect. It means that you've decided to look beyond the imperfections."

- Anonymous

"We tend to forget that happiness doesn't come as a result of getting something we don't have, but rather of recognizing and appreciating what we do have."

- Frederick Koenig

"Success is not the key to happiness. Happiness is the key to success. If you love what you are doing, you will be successful."

- Herman Cain

Have something to say? We welcome your comments and articles. E-mail the editor at levinee@prodigy.net

Member Articles

Coaching Corner

by Doug Sundheim

The difference between what the most and the least learned people know is inexpressibly trivial in relation to that which is unknown.

Those words from the famous physicist, Albert Einstein, also ring true for Coaching.

Consider This:

You can stop pretending. I know you don't know what you're doing. I know you're making everything up as you go (hoping nobody notices). It's OK though - that's not where your problems are coming from. Rather, your problems are coming from the fact that you think that other people know what they're doing. It's an illusion that's wreaking havoc in your life. It's causing you to doubt yourself. It's causing you to hide your challenges from others. It's even paralyzing you at times. No one else knows what they're doing either. They're making everything up too. Relax into your ignorance. Open up. Experiment.

I have a client who's a master at encouraging "not knowing" in his organization. He's created a culture that welcomes openly admitting when you're stuck or don't know what to do. Following is an example in his words. "Let's say we're in a meeting, and someone says they're going to take a lead on a project. I always ask the follow-up question, 'Do you have a clear idea of your next steps?' It challenges them to check-in with themselves. If they say yes, I ask them to briefly outline their approach. If they say no, the team helps them think through it. I never want someone walking away from a meeting without a plan for moving forward - even if that merely means doing more research. I've noticed that if we're not clear with each other, plans are left vague and action stalls. The truth is, we all struggle more than we like to admit. To work, the process has to be a 2-way street. I also have to admit when I'm stuck and need help thinking through something. It sends the signal loud and clear that others can do the same."

Try This:

1. Practice admitting when you're stuck or don't know what you're doing (perhaps in safer environments at first).
2. Open up to others to help you begin to find answers to your challenges.
3. Begin to notice the sense of freedom that can come from not having to "know" all the time.

Doug Sundheim is an executive coach/consultant and frequent keynote speaker for corporate and association meetings. Visit him online at www.clarityconsulting.com

Member Articles

Five Questions to Ask Before You Develop Your Leader's Guide *By Judith H. Steele*

Close your eyes and think of a Leader's Guide. What you're thinking of may be very different from what the next trainer envisions.

But, don't worry -- not all Leader's Guides are equal, nor should they be. A Leader's Guide can consist of a simple agenda with bullet points; a fully scripted, detailed set of instructions for every training activity you will encounter and then some; or anything in between.

How do you know which type of Leader's Guide is appropriate for *your* training?

The time to ask the right questions is before you begin (or ask others to begin) to draft your Leader's Guide. When you ask -- and answer -- these five questions, you make the most of your resources, align expectations with results, and maximize your training impact.

1. What is the scope, duration, and importance of the training?

Is this training a one-time only, limited endeavor, with just one or two trainers in one location? Probably not worth developing a Leader's Guide that has every bell and whistle.

On the other hand, let's say it's a high visibility, high volume program that will be repeated in every region each quarter for several years, supporting the company's main product.

In this instance, a full-blown Leader's Guide makes more sense. Not only will it help ensure consistency and quality across the regions, it also can be used to help "sell" the training internally. While normally the Leader's Guide is for trainer's eyes only, in this case you may want to use certain parts of it to give key executives overviews of the program and build their support for your training goals.

2. What do your trainers already know?

Think of their experience as trainers as well as with the subject matter.

For example, even if they're expert underwriters, lawyers, or engineers, your trainers may have little experience facilitating groups. In that case, you may want your Guide to include extra details about how to form subgroups, run interactive activities, or give constructive feedback. At the

same time, your Guide probably doesn't need extensive content detail, since your trainers are already very familiar with the subject matter.

On the other hand, if for example, your trainers are superb at group dynamics but on are a little fuzzy on the current underwriting process or how the new product compares to your competitor's, you'd be wise to provide more "meat" around training content.

3. How stable is the training content?

Include more detail in the Leader's Guide when the training content is comparably stable.

All training programs change over time, but some are likely to change faster than others. The faster the training program will change, the stronger the argument for a simpler, less detailed Leader's Guide.

For example, if the program content is based on the current year's tax laws, it's clear that the training -- and the Leader's Guide -- will have to be revised next year.

In contrast, a training program on communication skills is less likely to require immediate revisions due to obsolescence.

4. Is participant material worth including?

Some Leader's Guides include copies of all the materials found in the Participant's Guide. Consider the pros and cons of inserting all these case studies, exercises, and worksheets into your Leader's Guide.

If you include participant materials, there will be less back and forth for your trainers, and potentially a smoother training session. Many trainers say that having everything they need at their fingertips helps them better focus on delivery.

However, including participant materials in the Leader's Guide vastly increases the Leader's Guide size. This means added desktop publishing time and costs, more pages to print and a heftier, more cumbersome volume to tote and to use.

5. How will you train the trainers?

The level of Leader's Guide detail is also influenced by

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Member Articles

Five Questions to Ask

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how you plan to train your trainers. Will the Leader's Guide have to stand alone and be self-explanatory, or will it be a supporting "textbook" after a formal Train the Trainer session?

For example, let's say your plan is to simply give your trainers your Leader's Guide ahead of the scheduled session. They'll review it on their own and prepare to deliver the training. Without a formal Train the Trainer session, you'll likely need more detail in your Leader's Guide so that your trainers can fully understand what's expected.

However, if you plan to hold a formal Train the Trainer session, you'll have the chance to add oral explanations to what's in the Leader's Guide. You can fill in any gaps as you walk your trainers through the Guide, so extra Leader's Guide detail may not be needed.

Judith H. Steele is an instructional design consultant who helps businesses gain a competitive edge by improving the critical knowledge and skills of their employees. A long-time chapter member, she can be reached at JSteele393@aol.com



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Meet Leyda Cordova: Newsletter Layout Designer

Although I don't draw very well, I am a big fan of visual communication and graphic design. I have a degree in Communications Technology and was active in college theater, where I picked up the quote "Feed the senses," as a guiding principle in my life. I love music, food, travel, people, video production, photography and pop culture. Creativity and innovation inspire me. Change is something that I actually crave...



Over the last 28 years, I have moved and relocated within the Philippines (with my family growing up) and around the world (on my own and with my husband) a total of 20 times. I am still not a pro at it-- it doesn't really get any easier-- but I believe that it's contributed to my flexible and easy-going nature. And possibly to a receptiveness for the little nuances that exist everywhere.

I am one of those people who pays attention to color schemes and fonts, and I take notice of how things are packaged. When I get someone's business card, I always feel its texture and grain. I also like to look at the design and arrangement of their contact information. I suppose it is only appropriate that I observe these details, as layout design has a lot to do with the physical arrangement of paragraphs and graphics and the tiny fringe details on a page. I like working on the Chapter newsletter because I derive a sense of belonging and creative satisfaction from it. It is also a refreshing deviation from my usual jobs of running a business within the wedding industry, and keeping a toddler entertained!

I used to deliver training for an outsourced call center in Manila (at one point I was in the training room for 20 consecutive weeks!-- it was in one of those crazy weeks that I met my husband, the star trainer). Now I mostly do volunteer training at the City's Workforce 1 Centers. I feel incredibly energized during these sessions. The training professionals who volunteer their time and talent to this great cause inspire me, and the people who commit to attending the program to improve their lives move me. Volunteering may not necessarily "feed" me, but it sure feeds my senses and it certainly feeds my soul!

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SIGs and Committees for Members!

NY Metro ASTD has a number of active Special Interest Groups (SIGs) and Committees-- all as a benefit of membership. Many SIGs and Committees meet regularly and provide a great way to get connected to other learning and development professionals, and explore special interests in more depth. Please contact the leaders listed below for more information.

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