

Training & OD: Separated at Birth?

For all their similarity of interests, training and OD are like feuding siblings who don't speak. It's time they started.

On an airplane somewhere between Denver and San Diego, an executive mused about why his training people and his organization development people couldn't seem to work together. He thought he was encouraging collaboration, but what he saw instead was foot-dragging.

"Is it something about our organization?" he wondered. "Is it something I'm doing? Is it the individuals involved? Or is this typical?" His questions forced me to admit that I think a gulf indeed exists between training and organization development (OD), at least more typically than not.

I first noticed the chasm more than a decade ago. During a consulting project at a manufacturing company, the training staff complained at length about a manager they considered unreasonable. Without exception, they attributed her faults to her background in OD.

Not long after, I suggested to a group of colleagues that we all attend an American Society for Training and Development (ASTD) luncheon presentation on the topic of organization development. Several of my training associates chose to pass, observing that OD wasn't particularly relevant to training.

Yet another example presented itself about five years ago. I was teaching a class on needs assessment for some training professionals in a computer company. One of the messages was that the data one gathers in assessing a performance problem will often point to solutions other than training - solutions like team-building, culture change, strategy alignment or feedback systems. One gentleman objected, arguing pretty much as follows: "I have a problem with this because we don't know about all those approaches. We aren't the people who handle any of that. We don't work with them. They aren't even located anywhere near us." There were nods all around. In a room with about 30 managers, nobody disagreed.

Such has been my experience of the relationship between the training world and the OD world. So the phone call from Sandy Quesada not long ago came as a surprise. Quesada was then a training manager at Amoco Corp. in Houston. She remembered that I'd been tracking the peculiarities between training and organization development, and wanted to know if I'd play a role in getting Amoco's training and OD units to work together more closely. (Didn't I think that their shared commitment to analysis might be a good place to start?) Within the month, someone at another company, this time in financial services, called to chat about a similar initiative.

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Suddenly people are interested in collaboration between training and organization development. Why now? Maybe it's the quality movement with its belief in cross-functionality. Maybe there's growing recognition that what counts is results, and that business results depend upon alignment between what people are taught and what organizations actually practice and applaud. Maybe it's a newfound inclination to use systematic assessments to define solutions to performance problems. Maybe it's renewed customer focus. Maybe "performance technology" is finally shifting from idea to reality. Or maybe it's the collective impact of years of wasted opportunities. Whatever the causes, there is growing enthusiasm for aligning OD and training.

How might we go about that?

WHAT THEY DO

Just what is organization development? Plenty of definitions can be found among practitioners and in the literature. (Lee Bolman and Terrence Deal's *Reframing Organizations* and Michael Harrison's *Diagnosing Organizations* are two favorite sources.) But the only way to achieve much agreement on a single definition is to sketch very broadly and, consequently, not very usefully: OD involves attention to diagnosis, strategy, roles, systems, processes and measurements that enable organizations and people to achieve their goals.

A more useful question is: What do OD professionals do? Here we can draw a more robust picture. Some create high-commitment work teams, an effort that often involves rethinking leadership and power relationships. Others participate in projects that transform organizational structures, beliefs, values, cultures and systems. OD people use a wide array of interventions, including leadership development, team-building, organizational design, culture change, strategic planning, facilitation of meetings and groups, conflict resolution, enhanced participation programs and performance management.

What, then, is training? *Webster's* defines it this way: ". . . to make a person or animal efficient in some activity by instruction and repeated practice . . ." Somehow that fails to capture the richness of the field I know and love.

So what do trainers do? Most analyze needs. Some build training courses. Others deliver courses. Some coordinate people and facilities. Many create instructor-led programs; some create self-study programs in print and technology-based formats. Trainers conduct evaluations, create job aids and electronic performance support systems, build multimedia products, serve as performance consultants, select and coordinate training vendors, coach employees in the workplace, establish on-the-job development programs and more.

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SIBLINGS . . .

Trouble is, every time I assign an activity to training or to organization development, I can think of an example that contradicts the classification - a training manager whose life is devoted to team-building or an OD person who is a skilled course developer or instructor. In many ways, training and OD professionals are siblings:

Both traffic in change. Training and OD practitioners agree that they have responsibility for growing their people and organizations, for playing significant roles in transformation. Amoco has now established an entity called the Organizational Capability Group (OCG), charged with coordinating efforts to bring about corporate change. Training and organization development are but two of many specialized units formally linked to enhance initiatives aimed at performance improvement. Says Katie Smith, practice area leader for instructional systems development (ISD) at Amoco: "When it first happened, I didn't have a clue about how it could work. Since OCG, many of our OD consultants are now in long-term productive relationships with a single client, and they are right there and positioned to leverage training and the other OCG service units."

Both are driven by clients' needs for improved performance. Whether the request is for a course on Lotus Notes or a curriculum to update the skills of auditors or assistance with strategic planning, training and OD professionals perceive themselves as responding to and serving their customers' articulated requirements.

Both acknowledge responsibility for customer education and business partnership. While being responsive to the needs that customers express, most trainers and OD people agree to some responsibility for developing the customer's understanding of performance improvement and, therefore, the accuracy of customers' perceptions of their own needs. In other words, professionals in both fields believe that the customer is not always right. More, they believe that ethical practice often forbids giving customers exactly what they ask for. Instead, the professional is supposed to probe and study the nature of the performance problem, and sometimes to disagree with the customer's proposed solution. ("Yes, I know you want a team-building course, but the problem here seems to be fuzzy goals, not poor teamwork.") As Jeff Lickson of The Consortium, a Houston consulting firm, puts it, both trainers and OD specialists are supposed to "Just say whoa" to hasty requests.

Both are committed to assessment and measurement. OD and training professionals espouse allegiance to searching analyses, continuous measurement, and basing their recommendations on solid data. Most trainers and OD people would hesitate to admit that they based an

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intervention on a hunch, or on a personal preference (for multimedia or visioning or whatever), or because the boss likes it. Practitioners in both groups take pride in diagnosis. There are, of course, cases that demonstrate that this is sometimes more a goal than a description of actual practice.

Both are committed to systematic approaches. Embedded in the literature and customs of both groups is a demand that practitioners go about their business systematically instead of "winging it." They are supposed to use defined processes and orderly approaches. They should have clearly articulated goals. Their activity should be data-driven.

In addition, another mantra is enjoying rekindled allegiance - systems thinking. The systems paradigm commits the practitioner to analyzing causes, using these root causes to define strategies, and establishing cross-functional and wholistic approaches to improve performance. In the training world, systems thinking has roots in classic books and teachings by people like Robert Mager and Joe Harless. Today, readers in both the training and OD camps are embracing works such as Peter Senge's *The Fifth Discipline: The Art and Practice of the Learning Organization* and Geary Rummler's *Improving Performance: How to Manage the White Space on the Organization Chart*.

... BUT NOT TWINS

Though there are many similarities between them, OD and training professionals tend to be keenly aware of their differences. The distinctions that follow are generalizations, valuable for the discussion they encourage, not for their application to any one setting or person:

Focus of attention. Historically, trainers have prided themselves on what they can do for individuals, while OD specialists have looked more toward the entire organization. More recently, members of both groups have been talking about the need to expand their views to encompass the work, the worker and the workplace. Though alliterative and appealing, this enlargement of perspective is far from a done deal and is complicated by the emerging importance of teams. Who serves teams? While the obvious answer is that we all do, teams present opportunities for both collaboration and conflict between trainers and ODers.

Nature of the customer. There is a perception that the customers associated with organization development tend to reside at higher levels in the organization. In a mixed group of training and OD professionals, one OD specialist pointed to what she saw as a difference between them: "We work with the executives and I don't think you do." While the number of exceptions to this statement is probably growing, the trainers in the room didn't disagree.

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This perception doesn't encourage trust, according to Cora Pendergast, a San Diego consultant with master's degrees in both educational technology and organization development. She notes that trainers are sometimes reticent with OD people, who tend to earn more money than trainers and whose role is to assess the organization and share information with an executive.

Perception of role and power. Another perception is that OD professionals are more typically found in strategic roles while trainers labor in tactical arenas. When pressed on this, both sides do some breast-beating, with trainers acknowledging the need to be more strategic, and OD people admiring the trainers' tangible tactical successes and the customer appreciation that comes from them.

An incident during a class on how to conduct a needs assessment illustrated how the differences in perspectives can play out. The group was working on a case in which an executive sought help with what was initially described as "messed up performance appraisals." We talked for 15 minutes or so about diagnostic strategies to ferret out the nature of the problems with the appraisals, and how to determine a good solution. We were, I thought, appropriately skeptical about training as the sole solution to this appraisal problem. But then an OD specialist in the class challenged our complacency: "I think we're jumping into fixing the appraisals too quickly. Before we look at randomly pulled appraisals and model appraisals, and before we interview supervisors and so on, shouldn't we be talking to management about whether the organization ought to reconsider its approaches to hierarchy, appraisal and performance review? You're assuming the leadership knows what it's doing with its performance management strategy." And we were. Few trainers are naturally inclined to challenge the basic assumptions underlying organizational practices, to push hard at the wisdom of a request, or to provide leadership in discussions of strategy and alignment. OD people are more likely to describe that as their role.

Where we live. At Amoco and elsewhere, most organization development consultants are entrenched in long-term relationships with clients, while training professionals tend to be peripatetic, engaging in more and shorter interventions for several corporate units. One effect of this is that trainers may spend more of their time on project management and documentation, since unfamiliar clients are more likely to demand a formal rationale for any intervention and to insist on seeing some concrete evidence of success. The positive side is that these demands encourage the kind of analysis and measurement that trainers say they want to do anyway.

Areas of comfort. Suppose a needs assessment reveals that the main cause of a department's performance problem is that its manager is inconsistent and capricious. How comfortable

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are you about going where that data wants to take you? If you're a trainer, the answer probably is, not very. This is a rather sweeping generalization, but more OD professionals than trainers are at ease in the realm of conflict, climate and feelings.

Computer-training manager Dawn Hall of Hunter Industries in San Marcos, CA, is forthright about it. "I didn't know what organization developers did," she says, "so I couldn't figure out how to coordinate with them. Now I'm getting them involved in conflict resolution and team facilitation. They're better at it than I am." Consultant Pendergast agrees, noting that OD specialists "take more interest in personal change and attitude, while trainers tend to focus more between the ears, more on skills acquisition."

Event vs. process orientation. While both training and OD professionals get tagged with reputations for analysis paralysis, OD people suffer much more from that image. Valid or not, the perception is that ODers love process and resist closure. Trainers, on the other hand, get credit for consummating their projects. But here's the rub: These trainers are then charged with being satisfied with educational events instead of pursuing the more elusive but higher-value systems fixes.

SOME MARRIAGES

The executive on the airplane isn't the only leader interested in improving the relationship between training and organization development. Now, finally, some companies are moving to blur conventional distinctions between the two. Like Amoco, they see it as a strategy for performance improvement.

Andersen Consulting Education. This St. Charles, IL-based group has received national awards for its commitment to training. But where once Andersen Consulting hired primarily instructional designers and technologists, the company now makes sure to select some people with formal training and experience in organizational design and strategic planning. It's a business decision, says Larry Silvey, a partner and managing director at Andersen; the firm isn't doing education for education's sake. The purposes are change, performance improvement and business outcomes. For that, Andersen needs a bigger and more cross-functional tool kit.

AT&T Universal Card Service. Linda Swanson, vice president of human resources at this 1992 Baldrige Award-winning company, says her unit is shifting to a more consultative role, where OD people, human resources people and trainers perceive themselves first and foremost as business partners to each other and their customers. Bob O'Neal, director of training at Jacksonville, FL-based UCS, puts it like this: "In the past, training would do performance analyses and come up with training and non-training solutions. Then we'd beg to put solu-

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tion systems in place. The new organization formalizes all this."

The new collaborative goals are reinforced by the measurements the HR unit now uses to gauge its success. Instead of counting bodies in classes or the number of team-facilitation gigs it runs, the new organization will be judged by its ability to contribute to business results. O'Neal is laboring to link services to real problems in the organization and then to measure the improvements that occur.

The United States Coast Guard. The Coast Guard has been moving in this direction for several years, as indicated by the "Training Division's" name change to the Training and Performance Improvement Division. According to Lt. Cmdr. Terry Bickham, commanding officer of the Pacific Area Training Team, this is much more than a change in the letterhead. In July 1994, the Coast Guard commandant issued the equivalent of an executive order (COMDTINST 1500.23) articulating a new philosophy of training, education and development. The document recognizes the limitations of training without root-cause analysis and presses the organization toward systemic solutions. An attachment to the actual Coast Guard document demonstrates a much broader philosophy of performance, referring to a wide array of "job performance influences," like job aids, achievable criteria, policy, feedback, worthy tasks, confidence, strong leadership, timely training, coaching and more. The order ensures that trainers and OD specialists will cooperate in the effort, no matter their place in the organizational hierarchy.

Bickham cites the topic of leadership as a recent success. Historically, the Coast Guard offered formal leadership training in several locations and formats, each associated with the rank or enlistment status of trainees. Henceforth, all offerings, including those provided to midlevel enlisted people, will occur at the Coast Guard Academy in New London, CT. The idea of bringing together many levels of Coast Guard people at the academy represents a significant cultural change, says Bickham. "It says very strong things about the importance of leadership in our organization, top to bottom. It was the right thing to do, and it wouldn't have happened without the big-picture collaboration of trainers and organizational developers."

ALIGNING TRAINING AND OD

The relationship between training and organization development may be evolving, but it's certainly not happening everywhere. When pressed to describe the connection between training and OD in his company, a training executive at a large technology firm dropped his voice and admitted to managing it so that he and his people "didn't bump into the organizational development group." This executive is a strong advocate of shifting training's focus

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away from educational events and toward systemic solutions based on good needs assessments, and he was slightly embarrassed about the gulf between his people and the OD unit. He acknowledged the oddity of the rift, given his belief in cross-functional performance support, but he hadn't done anything about moving toward either acquaintance or alliance.

Situations like that serve neither the professionals nor their companies. Here are some suggested strategies for enhancing collaboration between OD and training:

* *Capitalize on high-level sponsorship.* This article began with an executive - not a trainer or an OD person but a client of both functions - who sat on an airplane and wondered why the two didn't collaborate. It was the Coast Guard commandant, not someone from training or OD, who could employ a directive to make collaboration the rule rather than an exception.

* *Develop high-level sponsorship.* If it doesn't exist, try to create it. If your organization's leaders are unaware of the possibilities, educate them. Cite examples of the cynicism generated when employees are trotted off to classes that have nothing to do with the key behaviors the organization really desires or rewards. Nearly every company has examples of unsupported training events. You'll likely have to look no further than mandated sessions in telephone skills, continuous process improvement, diversity or teamwork.

* *Demonstrate the fit with existing and emerging initiatives.* Is a quality-improvement drive under way at your company? That's a natural. So is the recent interest in "the learning organization." Peter Senge in *The Fifth Discipline* and David Garvin in a 1993 article on organizational learning in the *Harvard Business Review* both lament the cost of organizational boundaries and cheer the benefits derived from more permeable membranes. General Electric CEO Jack Welch identifies "boundarylessness" as a key tenet of GE's corporate strategy.

* *Create pilot collaborations.* Before enacting anything resembling formal reorganization, try some pilot projects. Measure their impact. Publicize the business results they achieve. Establish teams that include OD and training people, and assign them to help key clients solve performance problems. Create ad hoc and visiting relationships so that familiarity can encourage alliances.

* *Encourage people in each specialty to learn more about the other.* Focus on the commonalities as well as the differences. Use sample requests for training or OD assistance as the basis for discussion about similar and distinct perspectives and approaches. Together, read and discuss the work of Edgar Schein, Chris Argyris, Rosabeth Moss Kanter, M. David Merrill and Roger Schank.

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* *Analyze what hinders collaboration.* There are often incentives that create distance and even competition between the two service units. Recognize the rivalry that can emerge in billable contexts, when both groups are trying to achieve their target percentages or recover their costs. Examine the history of the relationship. Work with the leadership of the two specializations to address these obstacles and transcend turf battles.

DRAWING PICTURES

The fact that it is hard to make any case at all against building alliances between training and organization development doesn't mean that those alliances are easy to bring about. Many trainers are genuinely sold on the idea of broader analyses and examining non-training solutions to performance problems, but that doesn't necessarily inspire them to reach out to OD specialists. The Coast Guard, Amoco, AT&T's UCS unit and Andersen, large organizations all, have chosen to bring specialized people together in structured and ad hoc ways. In other places, the trend is toward expanding the individual training professional's repertoire. One friend in government suggests that this individual-development strategy occurs because partnerships are perceived as too hard to effect.

OD and training are professions in transition, buffeted by shifts in priorities regarding empowerment, organizational structure, and specialization vs. generalization. The only certainty is management's desire for higher quality, lower costs, faster cycle times, and overall performance improvement. Eventually, these critical goals will precipitate more leveraging of training and OD through means narrow and grand, formal and informal.

At a training conference last year in Atlanta, Amoco's Quesada and I asked about 100 people to draw a graphic picture of the relationship between training and OD in their organizations. We got circles. We got squares. We got smiley faces and frowning faces. We got lots of white space. What we didn't get much of was overlap, proximity and arrows. What kind of picture would you draw?

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