

ELFH 671 Performance Consultant Interview

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I had the pleasure of interviewing Karen Boyle Polik from Learning Gurus, Inc. Learning Gurus began as a collaboration among top-notch learning professionals who were frequently booked to capacity with eLearning, Instructional Design, and Performance Improvement projects. Karen is founder and CEO of Learning Gurus. She has over 15 years of experience in education, business, and government consulting. Karen has had the opportunity to work with multiple companies, such as Microsoft, IBM, Arthur Andersen, 3M, BF Goodrich, Mitsubishi, Ameriquest, Petco and Sempra.

Karen has a Bachelor's degree in Psychology and a Master's degree in Educational Technology from San Diego State University. She is an active member of ISPI and ASTD. She has been on the Steering Committee for ASTD's award-winning Mentor Program and was also selected to participate on the ASTD International Conference and Expo Program Advisory Committee as an eLearning Track advisor. Karen first became involved in HPT while working on her Master's degree at San Diego. During the interview, she mentioned that her mentor during graduate school was Allison Rosset. Ironically, Allison was my original pick for my performance consultant interview. However, she was unable to schedule any time due to previous commitments. According to Karen, Allison is well known in the field of HPT and eLearning. It was through her mentorship with Allison that she first became involved in performance consulting. During graduate school, she had an internship as a performance consultant in the field of eLearning at Microsoft.

While Learning Gurus is mainly focused on eLearning and training/development, Karen believes that her experience as a performance consultant helps her a great deal with both the eLearning and training/development. She mentioned that on several occasions clients would request some type of training to fix their performance problems. However, with Karen's background in HPT she has been able to guide the client into other directions. I asked her how this worked because it could take business away for

her company if they did not really need eLearning or training/development. She stated that, "Through my experience in HPT over the years, I believe that you should do what is best for the client and not what is in the best interest of yourself." I see this as being very important in building a great clientele base. If the client sees that you are really investigating the issues plaguing the company, then they are more likely to buy into the recommendations.

A great example of Karen doing the "best" for the client can be seen in the most important HPT project that Karen worked on. She was called into a national pet supply store that was trying to boost their customer loyalty. The issue at hand was that customers weren't signing up for loyalty card. The program was too complicated – accrue points for dollars spent, receive coupons by email, coupons expired in certain number of days, etc. The sign up was paper-based and cumbersome. Originally the company asked for Learning Gurus to create online elearning modules for their staff on better ways to interact with the customer. However with Karen's background in HPT she was able to guide the company into a different approach beyond just training. She provided recommendations on streamlining the points system, the sign up system (in California there are regulations around what kind of customer information you could ask for at register – no phone number) by creating a kiosk in store as well implementing hand-held iPad-like devices so associates could walk around the aisles (away from cash register) and sign customers up. As for training, Karen's group created online training courses with video-based role-plays and scripts to help associates understand the advantages of the program and how to approach customers. She also recommended a cashier flash card that had key messages about benefits, script for inviting customers to join the program, and on the flip side, instructions for signing up via hand-held or kiosk.

Upon hearing about the project she considered to be most important HPT, I was able to ask about the various models that impacted her on this project. Allison Rosset's

book *First Things Fast* has stood out as important to Karen. Much like how Rummier's book is our guide to HPT, Rosset's book was Karen's guide. She also mentioned that Mager's Performance Analysis model was also a model that impacted her work.

Karen believes that the best way to "campaign" for the implementation of the performance improvement project is to show the client the cost/benefits of the changes. With most companies it all comes down to the bottom line. If the solution can be tied to the bottom line, then they will be more likely to adopt the changes. She also mentioned that you need to be able to show how it can be measured for success. Clients want to see how they can evaluate the successfulness of the project.

Upon closing the interview, I asked Karen for tips for a new professional entering the world of HPT. "Don't be afraid to ask questions about whether a training intervention will give the desired results – throwing training at everything isn't always the solution" was Karen's number one tip for new professionals. She also advised that consultants should "make sure you've looked at all factors." Karen also believed that consultants should look at incentives to perform well, hindrances to doing the job right, and hidden agendas. She gave a good example of hidden agendas by mentioning a time with a client that insisted that training was the only way to improve performance. The hidden agenda with this client involved her contact in the organization having a performance goal that stated they would implement a certain number of training courses this quarter, whether we need they needed them or not.

The interview with Karen provided a great deal insight into the role of a HPT consultant. My interests are in the field of e-Learning and Karen provided me with several resources in regards to e-Learning. From my observations, HPT tends to be focused on corporate performance and no so much education. This interview gave me insight into how someone could do HPT with educational organizations.