

Only connect... but can they?



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James Newberry examines how training and development for marketing and business development can struggle in the professions and what we can do about it.

As two vital support areas, marketing/business development (MBD) and HR/learning and development (HRLD) should stick together. Over the past 20 years of working with firms of many shapes and sizes, the fact that they often do not work in harmony has been a source of personal concern to me. Why? Because the problems caused reduce considerably a firm's business effectiveness and impact. Professionals do not receive the personal development that they need in order to make a real commercial contribution.

What is striking about the two opinions shown below is not that they offer mirror image views of perceived inadequacy (although this is a relevant factor); it is more the underlying lack of mutual understanding.

A few months ago I was invited to do a presentation on CRM to an audience of HR personnel from different branches of the professions. The audience was enthusiastically interested, indeed positively curious and hungry for knowledge. But on reflection, this prompted a significantly worrying thought: why weren't they getting this information from their own in-house specialists?

Symptoms of the problem

If this relationship is less than optimal, how can the resulting problems manifest themselves? Here are two examples drawn from life.

Firm A's BD team is at the exciting, buzzy end of things. The team's director has been really impressed by a sales guru she met at an awards event – he is a cold-calling 'top gun'. She believes this is exactly what the firm's professionals need to spark them into a better selling life, so hires the guru to run a one-off session for the partners, some of whom attend. No training needs, objectives, or business-focused outcomes are specified for the intervention, which is run as a purely BD initiative. It has no impact on the firm's sales performance. ➤

Business development is an exciting, buzzy place to be; however, my colleagues there struggle when it comes to setting meaningful objectives and the follow-through required for measurable commercial achievement.

HR Director, UK law firm

Spitting image

I have come across good HR people who nevertheless lack something. Often it's because they have got there almost entirely through hands-on means. They don't have a knowledge of best practice outside their own limited experience of what has worked for them.

Business Development Director,
UK law firm



Amongst his other responsibilities, firm B's HR manager is tasked with developing and running soft skills training for its professionals. In response to requests from some of the partners, he has begun to develop and run training sessions himself on specific topics of interest in marketing and business development. He has not involved his BD colleagues in the process, believing that it is preferable for the input to be 'partner-led' if it is to succeed. Unfortunately, the first few sessions are poorly attended and received. The budget allocation for this activity is cut midway through the year due to the 'challenging' business environment.

Were it a case of just sorting out two parties here, we could generate sufficient ideas quickly enough to help things along positively. But there is a significant third party involved that, as we see from the two examples, complicates the issues considerably – the firm's professionals, the people that MBD and HRLD exist to serve.

Three steps to success

Clearly, this is a complex issue. Different firms will be at different stages in a continuum between most and least effective practice, and so success will depend first upon an accurate diagnosis of where the issues lie. Taking a position somewhere near the least effective end of things, there are three key stages that represent a path to improvement.

Step 1: houses in order

At the beginning of this article, we saw how MBD and HRLD staff can perceive each others' inadequacies. This must be the start-point for a rigorous examination of how the skill-sets of both live up to the challenge of delivering a more positive relationship. It is not acceptable for MBD staff to stay in the comfort of their departmental silos amongst like-minded colleagues rather than getting 'out there' and working with those sometimes challenging individuals called partners and fee earners. Yet many still do. HRLD departments operating at a tactical rather than strategic level are simply not able to address the challenge of creating an environment in which the most advantageous connections between MBD, HRLD and their professionals can be achieved.

All this requires both assessment objectively of strengths and weaknesses and – if the need to improve is significant – taking action to address them before Step 2. This could be about a number of things depending upon the individuals concerned – training, coaching, recruitment, job changes or re-alignment.

Step 2: get aligned

Now we go to the business of getting on the same wavelength together. This means degrees of formal and informal change to ensure that mutual understanding and unity of purpose are achieved between MBD and HRLD.

Joint planning and accountability – responsibility for providing skills training and development that works has to come from both MBD and HRLD. So they must be involved together in joint projects for needs assessment, setting aims and specifying/delivering on outcomes, ideally tied together by the achievement of bonus worthy objectives.

Communication and education – part of this joint working must be about achieving and maintaining mutual understanding of job content and context - sufficient to enable joint planning and execution to work. This can be gained via regular meetings, information share presentations and other internal communications, joint project work, training and development, and even job rotation or short/part-term placements.



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Step 3: collaborate and target

Now we have the biggest hurdle. Without the effective buy-in and participation of sufficient professionals, improved MBD/HRLD alignment struggles to make an impact. Again, there is a three-part challenge.

Influencing partner development - partners are made not born, so getting MBD skills on the agenda as part of the professional growth process for fee earners is crucial to ensure that more of them are commercially minded and motivated by the time they get to 'make it'. Some larger firms have gone a long way to formalising this with detailed competency/skills frameworks that have significant MBD components, and meritocratic rather than time-serving advancement through the ranks. Let's not go overboard here though: we know also of professional practices that are large, mid-sized or below who still remain in the dark on some or all of this.

Influencing partners in practice – here's the rub for those firms that have their competencies defined. Look more closely and you discover that exist they do – but either partners are excepted or implementation when it comes to measuring them against the criteria is ignored. So, in effect, partners are divorced from any responsibility and accountability for personal development when it comes to MBD skills. This cannot and is not allowed to happen in 'best practice' environments.

Rewarding the right behaviours – if such partner development and practice are in place, then firms can deliver where it matters to most: in the bonus and other meritocratic reward systems that are replacing the old time-serving ways. Solving these issues are vital to the success of any MBD training and development - and therefore for the success of any of the initiatives that your departments invest much of the firm's money in and work so hard to realise. Because, nine times out of 10, they depend upon the professionals to make them work.

By collaborating and targeting these specific issues and working better together as a team, MBD and HRLD personnel at all levels **can** have a significant role to play in:

- helping to drive a strategic and tactical focus on MBD and people management skills to ensure that partners are developed, measured, and rewarded against the right criteria; and
- working with their professionals to deliver on these criteria, for example, by being involved in appraisals and other performance management activities as the 'trusted advisers' to those who aspire to be trusted advisers themselves.

I believe E. M. Forster's maxim - "Only connect the prose and the passion, and both will be exalted" - applies totally to the delivery of viable training and development in the professions (whether you see MBD as passion/HRLD as prose or vice versa!). It is complex and requires vision and considerable commitment, but it can be done.

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