

**APPLICATION DIFFICULTIES OF PERFORMANCE CONSULTING WITHIN
ORGANIZATIONAL EDUCATIONAL PROCESSES.**

by

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RESEARCH ESSAY

presented for partial fulfilment of the requirements for the degree

MAGISTER EDUCATIONIS

in



FACULTY EDUCATION AND NURSING

at the

RAND AFRIKAANS UNIVERSITY

SUPERVISOR: PROFESSOR SJ GRAVETT

NOVEMBER 1998

ABSTRACT

Telkom SA Ltd. has a newly constituted national in-house training organisation known as the Center for Learning, which needs to provide performance improvement solutions and initiatives to the company in order to meet the challenges of a more competitive market. The exclusivity period in providing telecommunication solutions in South Africa is drawing to an end with major international competitors waiting to enter the presently exclusive market.

The voices of the operational business units are heard in their frustration as to the inaccessibility of much needed performance improvement solutions. In particular one educational process, this being the performance consulting process, has been identified to be lacking in its functionality of application. This performance consulting process entails inter alia relationship building, competency profiling, needs analysis and personal development planning and programming. In addition the speculation of the media on the resignation of the chief operating officer of Telkom includes the slow pace of training to be a contributing factor.

The research problem emanates from the expectation of the performance consulting process, which is supposed to be dynamic in identifying performance needs and translating it into interventions customised to real time needs of operational business units.

The research approach followed to investigate the application difficulties of performance consulting, entailed the qualitative methodology of full participative observation, observation and interviewing of purposively selected subjects. Examining people's words and actions in a descriptive way represented the situation as experienced by the participants. The constant comparative method of data analysis provided six categories of information, reflecting the perceptions of the function and process to be followed by the

performance consultant, which contributed to the conceptualisation of a theory behind the problem.

The perceptions, views and concerns expressed by the research subjects were found to represent the mere symptoms of a more fundamental problem within the Center for Learning as an organisation. The difficulties experienced in the application of the performance consulting process are therefore considered to be a result of this deeper problem.

The recommendation in answer to this deeper problem includes the suggestion that an independent task team should assess the nature and extent of the internal problems to this performance improvement organisation, intentionally aligning it to support the company in its business mission.



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1 INTRODUCTION

Telkom SA Ltd., also referred to as Telkom or the company, is currently holding the monopoly in respect of South Africa's fixed telecommunication networks, providing service to all sectors of the market by means of a human resource compliment of fifty eight thousand people. The situation is about to change though. Telkom SA Ltd. is about to face its first true competitors in world telecommunications. The exclusivity period provided by the government for rendering telecommunication services is drawing to a close. Strategically there is a sense of emergency amongst top management as to whether this company would make the grade when tested in the international waters of business competition.

The effort to become more competitive in the telecommunication industry, and retain as much of the telecommunication customer base as possible, implies that the company would have to upgrade its competence in more than one area. The more than fifty thousand employees within Telkom need to become more customer focussed as well as competent for a competitive environment.

With a training budget of R301, 5 million for the 1998/99 financial year, sufficient training can be bought from all over the world. The challenge however lies in the ability to invest this money effectively in the people of Telkom SA Ltd., to improve their competencies, and therefore improve the performance of the company to such an extent that there will be a real return on this multimillion rand investment.

The extensive and ongoing performance improvement strategies through business process development and personal improvement plans, is evidence of the urgency with which the development of these competencies is being addressed. Performance is measured by the deliverables produced by individuals over performance managed and contracted periods. It is definitely not what you do that counts, but the deliverables and the impact on churn and revenue generated.

It was mandated by top management of Telkom to investigate the existing status of providing performance improvement solutions and to reengineer the training organisation in positioning itself to support the company in its quest to improve to international standards. This has been done over a long period of time, and comprehensive business processes, structures and policies emanated from this exercise. In addition, the strategic equity partners came aboard during this period.

Nearly two years since the recommendations were made and accepted the newly constituted national in-house training organisation known as the Center for Learning is still in the process of transformation and restructuring. The operational business units, also referred to as line, are becoming more impatient by the day as in many areas delivery of much needed performance improvement initiatives are lacking, thus forcing line management to source basic training and skills enhancement products from external vendors. As a great deal of the training required is specialised, it is not readily available, or is extremely expensive.

One component perceived by these line managers to be contributing to the problems the Center for Learning are experiencing, is that of the performance consulting processes. The performance needs experienced by line are not correctly conveyed to the delivery teams, and are mostly reactive and unsubstantiated.

The initiative for this study is therefore born of the negative perceptions reflected in letters, meetings and general business communication of line towards the Center for Learning, and the detrimental effect an ineffective organisation can have on close to sixty thousand employees, when met by the realities of international competitiveness.

2 BACKGROUND TO PROBLEM, STATEMENT OF PROBLEM AND PURPOSE

2.1 Background

Realising the threats to Telkom SA Ltd. of an increasingly competitive marketplace, and the fact that the governmental exclusivity clause for the rendering of telecommunication solutions within South Africa is being phased out, various counter measures are being initiated. One of these measures took the form of a mandate passed by the executive committee of Telkom SA Ltd., for the revision and re-engineering of the training and development organisation within the company. The strategic intent of this mandate was enforced by the quotation, *“Remember, training is not what is ultimately important,... performance is”* (Marc Rosenburg in Robinson and Robinson: 1995), and included the following objectives which served as guidelines to the task ahead.

- * Become customer focused:
 - Recognise the role of the organisation or function in meeting end-customer needs
 - Enable timely, cost efficient, quality delivery of service to all customer segments

- * Get the business basics right:
 - Define critical functional elements and processes
 - Prioritise improvement opportunities to maximise value to the customer

The executive committee, in their mandate to emphasise the focus to be adopted by the project team, also used the following quotation. *“The traditional training process confuses training activity with performance improvement by focusing on employees’ learning needs, rather than on their performance needs”* (Robinson and Robinson 1995:preface). These objectives and guiding phrases emphasised the strategic intent of the

executive committee, and the challenge was to operationalise this exact intent.

After conducting an 'as is' analysis, portraying the then current scenario, the results were benchmarked against best practices throughout the world, which included British Telecom, Deutsche Telecom, France Telecom, Telia – Sweden as well as various American Telco's. The ideal, or 'to be' scenario was drafted in the form of objectives to be met by a modern day training organisation in support of its mother company. This 'to be' scenario was then used to derive a solution in answer to the executive committee mandate. This solution resulted in the re-engineering of Telkom's training and development business processes. The ways of rendering educational solutions, including the entire organisational structure, were transformed to facilitate the effective implementation of the new business processes, which in turn were focussed to address the real needs to individual, group, and ultimately, organisational performance, through competency building.

These business processes were engineered around the critical delivery areas of need analysis, research and design, sourcing and/or development, actual delivery and the assessment and evaluation of solutions and their impact on business results.

2.2 The problem

In the re-engineering of the organisational structure (emanating from the business processes), a job function was identified to address the need analysis process, in the form of a performance consultant.

Performance consulting entails *inter alia* relationship building, competency profiling, needs analysis, personal development planning and programming, and skill transfer. Currently this process seems to be lacking within Telkom of which evidence is found in the customer (line management) dissatisfaction. The inability to deliver effective educational solutions is becoming more prevalent as even the Business Day is speculating one of the reasons for the

resignation of the chief operating officer, Mac Geshwind, to be "...the slow pace of training..." (Anon., August 18 1998).

The performance consulting process is supposed to be a dynamic process in which delivery time of educational interventions are cut to real time needs. This does not seem to be happening, and it is therefore viewed as essential that the cause of this educational predicament within Telkom is investigated.

2.3 Purpose

The purpose of this research is to explore the performance consulting process application, and to establish the possible reasons why performance consulting within Telkom's educational processes is not effective.

3 RELEVANT LITERATURE

3.1 Introduction

As identified earlier, the problem of the study emanates from one particular area within a total business process; namely the performance consultative portion of relationship management and needs analysis, as well as the job function stemming from that. To elucidate this problem, the focus of the literature review is restricted to this particular process and function with the objective of providing evidence against which the claims, concerns and assumptions of the relevant stakeholders can be measured, these stakeholders being the performance consultant on the one hand and the customer (line manager) on the other.

Firstly I will explain the process as documented in the Telkom SA Project Document: Customer Focussed Delivery Processes – Project Training and Development, also referred to as the organisational guide of business processes, or, the business document. In this explanation I will highlight aspects considered contributory to the research problem within the areas of concern. Secondly the literature used to evolve this process will be used to

substantiate certain functions, procedures and conclusions within this process. The last part of the overview will emphasise the main claim and perspective of the problem, namely customer dissatisfaction, and should portray counter claims as experienced in the research action.

3.2 The literature

Given the fact that the research question is about a company's business process, the literature referred to is in the form of a business document in which these processes are captured. Although the document itself is considered to contain sensitive information, permission to restricted use has been obtained from senior management within the company. The process under question has been engineered with extensive reference to industrial counterparts as well as the principles and concepts of authors such as Robinson and Robinson (1989 and 1995), Rothwell and Sredl (1992), Warren (1985) and Noonan (1995). The substantiation of claims and the arguments with respect to the research question is therefore to be found in the contents of this company document and its substantiation in turn by the supporting literature.

3.3 Documented process overview

The concept and process of performance consulting was documented as a proposal, which is currently serving as a working document open for revision. The test lies in the application of this proposal as written, and discrepancies should be validated against the relevant sources to this work. Robinson and Robinson (1995) was the most influential source to this specific process. The reason for this is the strong sentiment towards this work found in the initial mandate from the executive committee of Telkom SA Ltd.

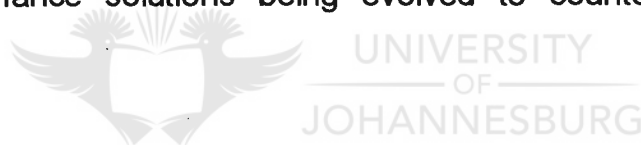
The documented performance improvement processes, and in particular the performance consulting process, is believed to be extensive in explanation and guidance towards its objective and therefore easy to be followed by the performance consultant. It should be borne in mind that the process has

multiple entry and exit points and does not necessarily need to be followed in the summarised sequential flow.

This process is then summarised under its respective subheadings as follows:

3.3.1 Relationship management

According to the documentation, the performance consulting process is based on relationship management. Robinson and Robinson (1995:15-21) refer to this as the “partnering skill” and “collaborative style” of performance consulting. The customer interface, identified as a performance consultant, establishes relationships with the customers. In this instance the customers to the performance consultant will be the personnel, line managers and/or executives of Telkom SA Ltd. The consultant initiates the initial contact with key management in the business units and maintains a business partnership between the Center for Learning and the business units. The accomplishments of this partnership include a consultative relationship and efficient performance solutions being evolved to counter skill/knowledge deficiencies.



The claim of the performance consulting process not being dynamic in its approach towards educational solutions is manifested in the following prescribed activities that are seemingly not applied.

Relationship management is supposed to include the activities of:

- Achieving customer satisfaction through customer surveys
- Submitting comprehensive key calling programs
- Achieving key calling program milestones
- Submitting a comprehensive executive call program
- Achieving executive calling program milestones
- Achieving signed goals per call report

Within these activities a number of objectives are set to ensure a sound relationship with the customer which in turn will give access to the business

plans as well as strategic information of the various business units. This information is necessary to plan and strategically align the training centre in providing educational solutions in a proactive manner.

The intention of relationship management is however not realised because these activities are not pursued as a constant principle, which leaves the customer frustrated in his attempts to achieve his performance goals.

3.3.2 Needs analysis process

Robinson and Robinson (1995:27) distinguish between business needs, performance needs, training needs and work environment needs. The effectiveness of a business is measured in its outputs. It is also recognised that these outputs are dependant on the competency needs within each of these different areas, which the performance consultant should be able to identify in order to address those business, performance, training, or environmental shortfalls having a direct impact on the business output. As all of these areas are in direct relation to the business outputs, they are referred to as the business needs, with the understanding that it incorporates all of the mentioned performance areas.

According to the process, business needs may be identified reactively or proactively. Robinson and Robinson (1995:23-47) explain this concept and Warren (1985:53-76) supplements the objectives and process of both reactive and proactive needs identification. In the reactive approach the performance consultant responds to a request from line (a business unit). In the proactive approach the performance consultant initiates contact for the purpose of identifying needs before the customer approaches the Center for Learning.

Currently the need analysis process is not applied and evidence of this claim can be found in the fact that the majority of performance issues are addressed through courses requested by the customer, without substantiation of the value or impact of such a course. The performance consultant will merely schedule a request, without validation or assessment of what the real need entails. One of the objectives of needs analysis is to differentiate between

wants and needs. Warren (1985:55) emphasises the necessity of determining the real needs in his words "... obtaining the desired performance must in some way add measurably to the organisation". In other words there must be a measurable return on the development investment. These 'wants' from the customer can be substantiated to be needs or the true needs can be determined by the implementation of the reactive need analysis process. The proactive identification process on the other hand will project business needs in terms of the competencies required over a period of time within the different performance areas.

The needs analysis process to be followed is, as mentioned earlier, based on the Robinson and Robinson (1995:23-47) model and will ideally be applied as follows.

3.3.2.1 Reactive identification of need

a) Customer requests assistance from the performance consultant

This process forms part of the reactive needs analysis response by the performance consultant. The performance consultant responds to a request for help from a customer. This may include a request for information (training courses available, consulting services, etc.) in the form a telephone call, email or memo.

b) Performance consultant qualifies the request

A questioning process determines whether the caller is requesting assistance for others or whether the individual is the one with the need. It also determines whether the caller is the one that can authorise an intervention and whether a budget has been allocated.

c) Performance consultant qualifies need

The questioning process determines the type of need expressed by the caller and whether it is a business need which reflects the goals for a unit, department or organisation, or a performance need which reflects the on-the-job behavioural requirements of people who are performing a specific job.

These needs describe what people need to do if the business needs are to be met. This questioning process will also determine whether it is a training need in identifying what people must learn if they are to perform successfully, or a work environment need in identifying what systems and processes within the work environment of the performer must be modified if the performance needs are to be achieved.

To enable a performance consultant to identify these diverse needs, he needs to be knowledgeable in all of these performance areas, and would have undergone intense training in this respect. To date it is not known that there has been such training or awareness exercise to equip performance consultants for this task.

3.3.2.2 Proactive identification of need

The ideal is for the performance consultant to identify the needs proactively, and the process for application is as follows:

a) Performance consultant identifies need

The activities to this process include the performance consultant analysing the business unit's business plan, attending monthly management meetings and observing line workers and supervisors in the workplace. The performance consultant then formulates the needs in business and performance terms.

b) Performance consultant requests interview

The performance consultant affirms assistance and indicates that more information will be needed for performance change. This interview is to determine what, if any, assistance can be provided to support the individual in meeting her/his business, performance and/or work environment needs. The interview will include discussions on determining what human performance issues may exist that could affect the unit's, department's or company's ability to achieve business goals.

This brings us to the purpose of the interview. According to Robinson and Robinson (1995:39), the purpose is threefold, mainly to determine

- the major business needs facing the individual now and in the next two/three years;
- the implications that these businesses needs have for the performance requirements of key positions within the individual's unit or area of responsibility; and
- what forces and factors, both within and outside the control of the individual, will challenge the accomplishment of business and performance goals.

The process even goes as far as to prepare the consultant for the interview and to assist in covering the most crucial questions. This is documented as follows.

d) Prior to the interview

- Set appointment with customer
- Draw up an agenda
- Formulate questions regarding current business goals
- Formulate questions regarding future business goals
- Formulate questions regarding the identification of performance implications

e) Statements to make before closing the interview

- Would it be beneficial to assist the individual in identifying the performance requirements of a particular job group?
- Would it be helpful to determine the specific performance gaps for a particular group of employees?
- Would it be of benefit if you determined the specific training and work environment needs for people in the individual's area and the priority of those needs so that business goals can be achieved?

Using this guide for interviewing as part of the process should ensure that the focus of performance improvement is maintained. Instead the experience is that ad hoc questioning results in the current situation of undisclosed objectives and unidentified needs, addressed with customer perceived solutions which is, and will almost always be training in the form of 'wanted' courses.

3.3.3 Documentation of performance proposals

This step in the process concretises the effort of performance improvement. Warren (1985:69) refers to this documentation as the data which serves in the agreement "... of 'can do' versus 'will do'" in delivering a solution. This is the stage in which the consultant has to document and affirm the needs and action plans in delivering a solution according to customer expectations of some return on his investment.

Again this function seems to be lacking in Telkom as no evidence can be found that any form of service level agreement between a consultant and line manager has been entered into. This leaves the accountability and respective responsibilities undelegated, which in the end results in empty promises, or the easier option of course programming, even though the solution may not be that of a course.

The following process facilitates this delegation of responsibilities, as found in Robinson and Robinson (1995:209-253), to ensure that all stakeholders meet their end of the agreement.

a) Customer interface documents and forwards performance proposal
As a confirmation of what was discussed at the interview, the customer interface then forwards a proposal to the customer specifying the areas of agreed deliverables, processes and actions, mutual responsibilities and, time frame and costs.

This is an initial agreement on the identified performance areas to be analysed, and serves as a passport into the work environment, for the performance consultant to do an in depth analysis of the perceived problem.

A negative sentiment from line management is currently experienced in meetings and communiqués between line and the Center for Learning with regard to performance issues to be addressed by training. Line managers are reluctant to allow the performance consultant to conduct any such form of need analysis, and would at this point not enter into a service level agreement, as the credibility of the training centre is considered very low. The evidence for this is found in the reluctance in granting interviews to consultants.

As soon as the initial contact is made and both parties have agreed upon the way forward, the next step in the process will be to agree on the action plans for the performance analysis and what may emanate from it. This will include:

b) Discuss and contract performance analysis

A performance analysis contract is an agreement to obtain information so that decisions can be made. It is to ensure that the performance consultant and his customer have identical expectations in terms of what will be done and how objectives will be accomplished.

This process has been documented as follows:

a) Conduct and document performance analysis

This includes the actual documentation of the performance analysis as per service level agreement. Activities includes performance mapping and designing of models for the identification of:

- Business goals and initiatives
- External challenges to goal accomplishment
- Internal challenges to goal accomplishment
- Performance implications as viewed by senior management

- Key performance results
- Performance activities (competencies)
- Quality requirements
- Work environmental factors
- Relative importance of all performance results
- Current skill to perform as required
- Obstacles to performance
- Skills gaps (difference between required and current skill)

b) Review performance analysis findings and recommendations

All findings from the analysis are reviewed in a meeting between the stakeholders. The purpose of this meeting is threefold:

- To review findings and formulate conclusions from them.
- To determine opportunities to take action.
- To formulate an agreement about what to do next.

Only after this complete process has been covered in the various stages of performance consulting, can the findings be reviewed and initial planning commence in terms of:

- Training actions (determine whether intervention be sourced or developed)
- Work environmental factors (determine how these factors will be addressed)
- Other human resource functions (determine integrated management of issues)
- Audience quantification (determine audience characteristics and suitable methodologies for delivery of the solution)

The initial process of relationship management is to be followed by the need analysis process, which could either be reactive or proactive. This process has been summarised to include the identification and qualification of the needs with respect to the reactive response on a customer's call as well as the proactive observation of needs. In both the instances the performance consultant would initiate interviews with the customer, with the necessary

preparation, from which the observation of best practices compared to worst is done. This includes the analysing of business plans and objectives, performance mapping, competency profiling, quality aspects, etc. From the result of this analysis, a performance development solution can be proposed, which may include training, human resource issues, environmental aspects, or any identified barriers to performance influencing business outcomes.

Apart from the trust issue mentioned to be part of the problem and reluctance to apply the process, this latter part of the need identification process for the rendering of performance related solutions, is not implemented. This is not conducive to the expected return on investment of performance improvement. If these factors contributed to the reasons for the chief operating officer of Telkom SA Ltd. to resign, it should be considered as a serious concern.

3.4 Conclusion

The key objective to the activities of this process is to establish a base of mutual trust in the initial stages of performance consulting. This trust is essential when the true needs for development are identified through either an on job analysis, or the interpretation of short, medium and long term business plans. This relationship of trust is not seen at present to exist between the performance consultant and line manager. The research has attempted to expose the reasons for scepticism on the part of the customer towards the training centre on the one hand, and the reluctance by the performance consultant to apply the process on the other. As stated in the research problem, this partnership which is perceived not to exist makes it impossible to deliver performance solutions according to real time needs.

4 ASSUMPTIONS AND PRESUPPOSITIONS

In conducting the research an assumption was made that the performance consultants and their interfaces, who met in the process of consultation, portrayed the current practice of performance consultation, and did not present a false, or revised practice to that of the normal. From this true

reflection of the application it is intended to unveil the contributing factors to the problems experienced in applying the performance consulting processes.

The assumption was also made that one of the reasons for the problems experienced in the application of the performance consulting process could include the prolonged process of transformation within the Center for Learning. This prolongation is caused by different factors, which include the adaptation of a different business culture due to the strong influence of the strategic equity partner. The conscious efforts to establish business processes by operational personnel, can also be a factor contributing to the inward focus of the Center for Learning, which leaves the customer in the form of the line manager and his subordinates, as well as executive management, with a support service which does not contribute to their performance improvement intent.

Another reason for the ineffectiveness of performance consulting was assumed to be the fact that these consultants has not undergone any form of formal training in performance consulting, or sensitisation of the processes to be followed in the role of a performance consultant. The performance consultant therefore perceives himself as a social interaction between line and the Center for Learning, and not necessarily as an instrument for line to improve individual, group, and business performance.

Although these assumptions were made beforehand, an objective attitude towards this study will bring to the fore the information which will help the stakeholders to the Center for Learning in their quest to establish an organisation, which will serve them in the effort to become the world class competitor it needs to be by the time competition enters the market in full force.

5 RESEARCH METHODOLOGY

5.1 Research approach

The research problem emanates from the experiences and perceptions of the people dealing with the process in question, and the line manager who needs to meet business objectives without the support of a performance development organisation. It is therefore essential to get an understanding of the situation through the eyes of these stakeholders. This implies a qualitative research approach which, according to Maykut and Morehouse (1994:2) "... examines people's words and actions in narrative or descriptive ways more closely representing the situation as experienced by the participants". They elaborate on this approach by emphasising the "... phenomenological position..." in understanding the meaning of a person's experiences and the interpretation thereof. Merriam (1992:6) explains the role of meaning schemes and perspectives related to the behaviour of people, and how this qualitative approach helps in the interpretation of these people's views and experiences through observation. The result of such an approach is a descriptive and interpretative view on the research problem through the claims and concerns expressed by individuals.

This approach is also conducive to the theme of this writing in 'the application difficulties' that cannot be researched in a better way other than the observation of the actual application, and the experience of individuals in this application. With this approach the problems experienced in the application of the performance consulting process can be observed, the experience of the participants examined from their perspective, and interpreted in a representative and descriptive manner.

5.2 Sampling

Patton (1987:52) and Merriam (1992:61) refer to purposive sampling as to help in the selection of the more informed subjects, to enhance focus of the research towards the problem. This was not the only consideration in adopting this approach for the selection of subjects. To investigate the research

problem, purposive sampling as explained in Maykut and Morehouse (1994:59) has been applied to ensure the diversification of the unit of learning areas in the performance consultative application. There are six units of learning represented by at least one performance consultant in each of the six regions, supported by a further seven national performance consultants working at a strategic level. This adds up to between forty and fifty performance consultants in the various regions, determining Telkom's operational and strategic performance needs.

Because I deal with them on a daily basis, the three units of learning identified for observation were management and leadership development, marketing and sales skills development and, multimedia skill development. The remaining three units of learning were not relevant to the business unit I find myself in, and therefore not considered to be part of the sample. The three selected units of learning were represented by a total of twenty-one performance consultants, of which seven were based at the head office of the Center for Learning to which I had access for the research to be conducted. This selection of consultants were easily accessible and available to serve as research subjects without having to travel to other regions resulting in practical and cost implications. All of these consultants were also considered knowledgeable with respect to the performance consulting function and process. No preference was given to one consultant over the other, and the specific consultants observed within each of these areas, were selected from these seven according to their availability at the time. Although not always willing to serve as a research subject, the consultants were co-operative in every respect after they committed themselves under the condition that their identities would not be reflected in the report, or disclosed in any other way.

This approach also helped to obtain the permission of the executive management of the Center for Learning for observation of the identified consultants in performing their functions and interviewing afterwards. The line managers (customers of the consultants) were only contacted after identification by such a consultant for a meeting. This customer was then

approached for permission to attend the meeting between himself and the consultant for observation, to be followed by an interview by myself as the researcher.

5.3 Data collection methods

The methods of qualitative data collection as discussed in Maykut and Morehouse (1994:68-114), was used in the form of full participant observation, observation and interviewing. Three cases of the application of the performance consulting process were observed, followed by interviewing focused on exploring and clarifying the events as observed.

Maykut and Morehouse (1994:69) explain full participant observation as getting involved in the experience, asking questions and giving input, but at the same time observing the events, participants and situation. This experience is translated into data, without interpretation, after participation, which includes field notes and the transcriptions of audiotapes that may have been recorded. I became a full participant in the application of the performance consulting process by consulting a product manager following the process of relationship building. This was accomplished in the sensitisation of my intent with the manager at an informal meeting as well as a social gathering. After I have won over the confidence of this manager, the need analysis process was applied. A proactive approach was followed for the needs analysis where the manager and myself looked collaboratively at the long and short term business needs emanating from his strategic business brief, as well as identifiable challenges which will influence the accomplishment of business and performance goals. The knowledge and information available to the manager enabled us to identify specific business needs in terms of goals to be achieved; performance needs in terms of individual and group dynamics to meet these business goals; training needs in terms of technical as well as managerial skills required to meet the required performance levels; and the work environment needs in systems and processes which needed to be established or reviewed to accomplish the business goals. The application of the process went without any major

hitches and I am convinced that it will serve the performance improvement intent of the Center for Learning if applied correctly.

Observation of the interaction between the performance consultant and line manager was also applied, with myself keeping an impartial distance in the process, taking field notes (refer to appendix one) on the events as they unfolded. These field notes are, according to Maykut and Morehouse (1994:73), a recording of what has happened during the observation, without interpretation. The researcher may however add comments to ensure that the data is as descriptive and comprehensive as possible. This I did to ensure that the context did not go amiss.

In the effort to disclose the experience and perspectives of the subjects, unstructured interviews followed the observations. These interviews were prompted by open-ended questions related to an incident or event observed during the interaction between the performance consultant and line manager. Examples of such open-ended questions would be 'Explain to me what your thoughts were when the consultant explained the organisational structure to you 'and' elaborate on your statement that this was an uncomfortable experience. The answer to such questions would have prompted a following question, which would clarify a feeling, concern and/or other interpretation by the subject with regard to what he has just experienced.

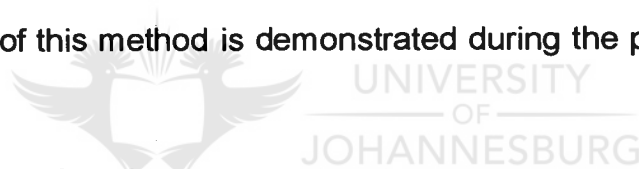
The interviews were conducted on a one on one basis, taking into consideration the diverse perspectives from customer and consultant. It was intended to video record at least one application, but the participants felt uncomfortable with the idea, as they insisted on full anonymity. Instead all interviews were audio taped and transcribed for analysis. (See appendice two for an example).

5.4 Data analysis

The data was analysed by using the constant comparative method of data analysis as explained by Maykut and Morehouse (1994:126) and Patton

(1987:150). The method entails that the raw data such as the field notes and hand written documents are retyped and audiotapes transcribed into a clearly readable format for analysis. These pages are coded to help in the identification later on when the analysis has commenced and pieces of information are disseminated into units and groupings of units. The coded transcriptions are read to form a holistic understanding and to identify and code meaningful pieces of information. A word, sentence or phrase forming the essence of this unit is indicated and is called a semantic unit implying that it is the smallest piece of information that can stand by itself and still be meaningful. These units of information are then sorted to fit under provisional categories. Should a unit of information not fit under a category, a new category should be developed. Rules for inclusion will help to refine the categories into meaningful groupings. Patterns and categories of meaning can now be identified by constantly comparing the smaller units of meaning to the categories and their interrelation.

The application of this method is demonstrated during the presentation of the data to follow.



5.5 Ethical considerations

Using both Merriam (1998:214-218) and Booth, Colomb and Williams (1995:255) as reference, ethical considerations were in consideration throughout the process by consciously avoiding plagiarism, keeping the stakeholder (Telkom Center For Learning) informed, and preventing the disclosure of sensitive organisational information. All participants in the observation and interviewing process were respected at all times in their views and statements as well as interpretation of events. A conscious attempt was also made to present the report in an understandable, yet not simple manner.

6 PRESENTATION OF DATA

There are a number of data analysis strategies that can be followed. Merriam (1998:156-164) discuss these options of which the constant comparative method was one method suggested for the analysing of raw data. The concept implies that semantic units of information are compared in order to derive provisional categories and later refined categories, leading to a conceptualised theory. The qualitative data analysis concept of constant comparison as explained by Maykut and Morehouse (1994:126-148) discussed earlier was used for the purpose of analysing the data to this study. Although the concept was used to guide the methodology applied, some variation was allowed for to fit the essence of the research problem in the conceptualisation of the theory derived from the analysed data.

As mentioned earlier, all interviews conducted were audio taped and field notes taken. These field notes were retyped (see appendice one for an example) and the audiotapes transcribed (see appendice two for an example) as per the guidelines offered by Maykut and Morehouse (1994:100). The transcriptions were read a number of times for familiarisation of the content. The transcriptions, field notes and other pieces of information were compared for the grouping of coinciding data. After grouping the field notes and transcriptions, a number of photocopies were made of the original material. The originals were kept as master documents and the copies as working documents, for analysing purposes.

The pages of these transcriptions and field notes were coded in the right hand corner of each page, as, for example, T1/1, meaning it is transcript one/page one. Different coloured marking pens were now used to identify and indicate different meaningful units of information. Each colour was to represent a provisional category. These provisional categories were; process positives, process negatives and consultant functionality. Further coding of these meaningful units of information were done in the right hand page margin, for example, T1/1/1, meaning it will be transcript one, page one, unit one.

Refer to the following example:

Transcription of an unstructured interview

T1/1
(Transcript one /Page one)

Setting: Line manager's office – Telkom Towers North, Pretoria.

Date of interview: 1998/09/03

Time: 11:00 to 11:45 am

Participants: One respondent (interviewee) and the researcher (interviewer).

Focus of interview: The experience of the interviewee with regard to the observed interaction with a performance consultant.

Interview conducted in English for the convenience of the interviewee.

Q: Thank you for granting this interview. I would like to urge you to be ... firstly, comfortable and secondly... to be honest in your opinions and responses... If I read the situation correctly... this was the experience you have met with this consultant.

A:

Q: Tell me what you experienced in this meeting with him.

A: Well... I didn't really know what to expect...

etc.

T1/1/1
Transcript one/Page one/unit one

T1/1/2
Transcript one/Page one/unit two

During the exercise of reading and comparing data, it became evident that all the transcriptions and the observations made followed an identifiable pattern in which the subject would express a perception on the function of the performance consultant, the consulting process and, generalised concerns with respect to the training organisation. These perceptions were also expressed from two totally different perspectives; one being from the line manager's point of view and the other from the performance consultant's point of view. In recognition to the trend of this obvious pattern, it was decided to rewrite the categories according to the perceptions expressed by the two diverse perspectives. This resulted in the more descriptive categories of;

- the customer perception of the performance consulting function;
- the performance consultant perception of the performance consulting task;
- the customer perception of the performance consulting process;
- the consultant perception of the performance consulting process;
- concerns of the customer; and
- concerns of performance consultant.

After total familiarisation with the content and ensuring that all units of information pertaining to the identified categories was noted and coded, the units of information were cut and pasted under their respective categories. To refine the categories and to ensure that only relevant data are recorded under such categories, rules for inclusion to the respective categories were formulated. For this exercise the guidelines provided by Maykut and Morehouse (1994:138-139) were used. According to these authors it was necessary to determine the properties and characteristics of the groupings under the categories, from which a propositional statement was derived and written as a rule, giving a specific meaning to a category.

The examples provided by Maykut and Morehouse (1994:139-141) helped in deriving these rules for inclusion of which an example is given below.

Example:

Category: C1

The customer's perception of the performance consulting function:

Rule for inclusion:

Customers express their perceptions of the performance consulting function based on their experience or lack of experience with them.

With the examples given by the authors, they mention the reconsideration of the names of the categories to ensure that it is written in a descriptive manner. After reconsidering and having changed the names of the categories earlier, it was decided that they were descriptive, representative and meaningful, and were not to be changed again.

In the refinement process of the data analysis, units of information were reread and measured against the rules for inclusion to ensure that each piece of information was categorised correctly. The categories were coded C1, C2, up to C6 and the units of information were coded accordingly to ensure that the semantics were maintained. These categories of information were now studied to find the meaning as reflected by the perceptions of the research subjects, which were to elucidate the contributing factors to the research problem, in the process of conceptualising a theory.

7 DISCUSSION OF FINDINGS

The findings are to be discussed according to the defined categories.

7.1 The customer's perception of the performance consulting function

In analysing the data it became evident there was an initial eagerness with both parties to express their experiences, concerns and expectations with

regard to the function of the performance consultant. On the one hand there was the unfamiliarity to the function of the performance consultant or his existence, and on the other, the past experiences with such a consultant and the perceptions that which resulted into expectations and concerns.

A major concern with respect to the perceptions of line management is the fact that the majority was unaware of the existence let alone the function of the performance consultant. It was in fact the first time that most have met with such a person. During the observations a note was made asking, "If I hadn't requested the observation of a consultant in action, would this manager ever have seen a consultant?". *"I didn't know who this person was or why he made the appointment with me"*. Almost every respondent during the interviews conducted with them echoed these words. This serves as an indication that the strategy of the new Center for Learning has not been communicated to its customer base, or, that line considered the Center for Learning as unimportant. The process of relationship management as explained in the literature overview failed in all instances dismally. There was no sensitisation period in which the performance consultant familiarised himself with the customer in his environment, or to gain the trust of the customer by him getting to know the consultant and his intent. No calling programs, which would have enforced the intentions and sincerity of the consultant, were established to secure a routine of visitations with the customer.

The fact that no initial relationship was established between the manager and performance consultant contributed to the scepticism with which the consultant was met. More than one manager was reluctant to meet with a performance consultant and referred such a meeting to the skills manager employed in the business unit, or the human resources consultant.

The majority of the line managers perceived the performance consultant as a training officer and it became apparent that the customer only wanted the consultant to list his requirements with respect to courses he would like his

subordinates and himself to attend. *"I want to attend..."* was in more than one instance the response to the performance consultant's question of what the performance needs were. According to the process a need should be qualified and quantified in order to determine the performance deficiency that needs to be addressed as well as to ensure that the correct solution is applied, which does not necessarily imply training. Being a performance driven company with the emphasis on performance improvement and enhancement through performance management resulting in performance development, it has become essential to ensure that the performance problem is defined in view of a business result or outcome.

On the question whether the consultant should be involved in the performance management process whereby the development areas of the individual is contracted, a mixed response was recorded. It was perceived that the line manager felt threatened by having an observer in the form of a performance consultant present in coaching sessions between himself and his superior, or even subordinates. Responses included: *"It's none of his (consultant's) business"* and *"I can't see how he can contribute... My manager is competent enough..."*. One respondent referred to the suggestion as *"... another form of 'policing' on how the line manager and his staff were operating..."*. The competence of the performance consultant to perform this type of function was questioned in remarks such as *"... a training officer won't be able to..."* and *"you'll need a qualified psychometrist to..."*.

On asking the customer how he perceives the function of the performance consultant, it became clear that the customer could not see this performance consultant, as part of his everyday interface with respect to development needs identification. The perception was that this consultant would have to be part of the customer's organisation, spending the majority of his time with the workforce, in order to get to know the people, the business, business processes and products and services. As one respondent put it: *"Without a total business insight this consultant will never be able to determine development areas within the organisation"*.

"If he can take my requests and schedule courses...". *"I should be able to reach him when I need a course..."*. *"I will call him or send him an e-mail if ..."*. These remarks from various respondents reflected the sentiment towards the function of the performance consultant. He should be a messenger between line and the Center for Learning in the scheduling of courses. The consultancy role in determining business and development needs through the relationship managed process of needs analysis, has not been demonstrated in this initial category of the performance consultant's function as perceived by the customer. The major factors contributing to this is the lack of trust on the part of line and the lack of a relationship management strategy which will enhance the respect and trust relations between line and the Center for Learning.

7.2 The performance consultant's perception of the performance consulting task

On the question what the performance consultant perceived his task to entail, very vague descriptions of functions were given. Responses were received in the line of: *"We try to meet with line as far as possible..."*. *"We get the training needs from the section ..."*. These statements indicated that these particular consultants were not aware of the task they had to perform as relationship managers, needs assessors and performance consultants in the true sense of the word. *'Trying to meet with line'* and *'getting training needs'* is a recipe to failure in meeting the performance needs of Telkom SA Ltd. Referring to the concepts of relationship management and needs analysis, the performance consultants mentioned the reluctance on the part of line to accommodate them in the application of the functions related to these concepts. *"The sections (line) are always to 'busy' to see us..."*. Apart from the fact that the performance consultants considered line to be non-co-operative, they were not clear on what their tasks entailed. The function was described as being a mere *"...go-between for the line and the Center for Learning"*.

It was however determined that there were two definite levels of performance consulting namely national or strategic, and operational. It did come across that the two had totally different focus areas. Where the operational group saw themselves as the go-betweens, the strategic group were considering themselves as mere observers and information gatherers to ensure strategic alignment between the Center for Learning and line. One respondent described the national function as follows: *"I gather information with respect to the strategic business from executives"*. This perception caused line, especially at executive level, to avoid contact with the performance consultants, as these executives considered time spent with a performance consultant, who would not add direct value to performance development, as time ill spent. *"We have our own strategists who can, and usually do, pass the information to the relevant stakeholders"*.

Some performance consultants interpreted the concept of relationship management to be the social interaction and attendance of events offered by line. *"I can't keep up with the golf days, product launches, seminars... "*. Furthermore the task of the performance consultant was interpreted to be nothing more than the satisfying of line managers requests for courses, as determined by these managers, and the scheduling and/or sourcing of such courses. *"Most of the training requests are given to me over the 'phone ..."*. Not only does this approach to consultancy defeat the object of needs analysis, but also the relationship management principle of personal contact for trust and respect reinforcement is non-existent.

The function of the performance consultant was given in the literature to entail the activities of:

- Achieving customer satisfaction through customer surveys
- Submitting comprehensive key calling programs
- Achieving key calling program milestones
- Submitting a comprehensive executive call program
- Achieving executive calling program milestones
- Achieving signed goals per call report

These activities are the start to relationship management process, which is lacking in the performance consultant's perception of what his task entails. It is perceived that because we are all part of one company, we have free access to all domains and business units. This perception is false as the performance consultant is offering a service to line which he should sell by being customer focussed in building relationships, earning the necessary trust and convincing the line manager of his intention to support him in achieving and even exceeding expectations of business success.

7.3 The customer's perception of the performance consulting process

The perception of 'don't call me, I'll call you' from line management brought the performance consulting process under the spotlight. Questioning the line managers on what their understanding of the performance consulting processes were, responses varied from, "*They have a massive structure...*" to "*Is there a process?*". It was mentioned by the managers as well as observed that only the organisational structure was explained, with no real reference to the business process to be followed in supporting the competency development efforts. Only one respondent answered with "*I would guess the process to consist of the performance consultant who would see to the delivery of training and the sourcing thereof should it not exist in-house*". According to him the development needs were to be determined by himself in either the day to day business activity, or formal performance management application.

It was evident that the line managers were not familiar with the performance consulting process and could not comment constructively on the issue. Explaining the process inclusive of performance management, reactive and proactive need analysis and looking after the complete spectrum of performance improvement drew the following reaction from respondents. "*Such processes belong as an integral part of performance management to our own business processes...*". "*I've never seen or heard of such processes...*". "*I thought this guy (consultant) only looked after courses we want*".

During one of the observations, a note was made posing the question; “*were any of these line managers aware that the Center for Learning has undergone an organisational transformation?*”. Putting this question to the test during the interview that followed the observation, the reply was negative and did the reply include “*...I didn’t even know that the name has changed from Training and Development to Center for Learning*”. If the Center for Learning is not visible in its support to line, and there are not definite communication channels to convey the intent, strategy and process of this support, it cannot be expected from line to know the business processes or functions of performance consulting.

7.4 The consultant’s perception of the performance consulting process

During the observation of these consultants dealing with their respective customers, it became evident that they placed a considerable amount of emphasis on the organisational structure of the Center for Learning. In answer to the question to why this has been case, it became clear that the consultants thought the consulting process to be directly linked to the structure in the processing of training solutions. One of the responses were “*the customer has to be aware of what my position is and who my subordinates or superiors are*”. Why this was considered important was not clear and was noted as a matter for concern to be pursued at a later stage.

Asking the consultant to explain the consulting process, the response was an elaborate explanation of internal (within the Center for Learning organisation) processes of scheduling, procurement, invoicing and sourcing. Very little was ever mentioned about the interaction with the customer, explained in the literature overview to be that of performance management, reactive needs analysis, proactive needs analysis, performance mapping, competency profiling, etc. Asking the consultants what these processes meant to them, the responses were “*... requirements were addressed as per customer request*”. “*Many of these functions are the responsibility of line management*”. “*... as a performance consultant I am not permitted by the manager to get into these sort of things (performance management)*”.

The manner in which the meetings between the performance consultants and line managers were conducted, as well as the responses by the performance consultants to the researcher's questions, led to the belief that the performance consultants were inefficient. Although a strong statement, the responses and observed actions of these consultants emphasised the claim that the performance consultants were ignorant towards the process either because they were misinformed or lacked the required competencies to fulfil this function. This also attributed to the customer not being informed about the intentions and supportive service provided by the Center for Learning. The performance consultant is supposed to sensitise and implement the process in a collaborative manner with line.

7.5 Concerns of customer

The customer expressed many concerns about the process, performance consulting function, as well as various other segments pertaining to the Center for Learning. These concerns were deliberately categorised separately as they elucidated the deeper and inconspicuous element to the research problem. For instance, in explaining the organisational structure, the customer expressed his concern about the fact that there were too many consultants in the process as there would be one for each unit of learning such as management and leadership, information technology, technical skills, etc. In order for line to even consider accepting such a function as performance consulting into their organisation, the process will have to rely on one consultant as interface to assess and source development related interventions. Another concern was the time it takes for interventions to be delivered as the process involves a number of procedural elements that could prolong the delivery time. *"I'm not interested in their internal arrangements, one can only wait so long for ..."* was one of the comments from a respondent.

Time was only part of the concern as timing also played a role in the coordination between the delivery of interventions and the performance management cycles of either six months or one year. The personal

development plan of the customer determined certain timeframes in which specific development areas were to be addressed, and the Center for Learning were seldom capable of meeting these timeframes in the delivering of interventions. One line manager did admit however that many of these personal development plans “... are handed in very late and leaves as little as two months for the development areas to be addressed...”. In reaction to this comment a direct question was asked in the line of - “*Is performance management taken seriously – is there a sense of ignorance towards it or lack of knowledge - or is performance management a farce*”. In reply the line manager put a lack of a standardised performance management system as a contributory factor, as well as the time it took to implement this concept.

The transformation and re-engineering process came under discussion at every meeting and it was line management’s opinion that there were “... too many of these initiatives at any moment in time to take any one seriously anymore”. These initiatives are considered to be becoming a trend and it does not necessarily contribute to organisational development towards efficiency.



The function of the performance consultant was seen as restricted to training issues and on questions asked around business efficiency, the feeling was that the consultant “...had sinister motives, not necessarily in the best interest of me (line manager)”. This raised the concern of the relationship existing between line and the Center for Learning. The suspicion of a lack in trust and sense of discontent were confirmed, as it became evident that line does not trust the integrity of the Center for Learning, including that of the performance consultant. The seriousness of this relationship was underlined with the expression of one performance consultant’s dissatisfaction with line in calling them “...arrogant” and others expressing similar sentiments.

7.6 Concerns of performance consultant

Apart from the obvious unfavourable sentiments towards line management, a prominent concern with the performance consultants was that the range of

their performance consulting activity was “...*too vast to even comprehend*”. This referred to the number of customers as well as their diversity, which had to be visited and interviewed, as well as the extent of the tasks they had to fulfil within the Center for Learning. It was also felt that they lacked the necessary training and experience to be efficient in their task if they had to fulfil it to the extent as explained within interviews. “*I have the whole central region including the Northern Cape, Free State and Western Transvaal to cover...* “. In this instance it was a big geographical area, and in others a smaller geographical but more populated area that raised concerns.

Another big concern was the unsure environment they perceived to find themselves in, as “...*restructuring was an everyday occurrence*”. One respondent remarked “*I don't want to get involved as I may not be doing this anymore by tomorrow*”. This resulted in an extremely negative attitude on the part of the performance consultant, which became a discussion point in almost every meeting with a line manager. Surely internal problems should not be the focus point of discussion with a customer.

Posing questions around these concerns, trying to find the reasons behind them uncovered sentiments of dissatisfaction with the current management situation within the Center for Learning. These sentiments were mostly poised against the strategic equity partner's attempt to apply foreign methodologies in the organisation, which is considered idealistic on the one hand and counter productive on the other. The concern was raised that “...*the equity partner has a hidden agenda*”, with further implications that these led to extreme internal politics which in turn was slowing the process of transformation. This slow pace of transformation could be directly linked to the slow pace of training which were of concern to the resigning chief operating officer. The question has to be asked whether this would be the only reason for him to resign, or was this resignation also politically inclined?

7.7 A holistic view of categories and how they interrelate

The focus of this research was on the operational application of a business process through a job function. Although definite shortcomings were identified, these were overshadowed by a bigger problem. This problem seemed to extend beyond the operational application of one process and became an organisational problem within the Center for Learning, which in turn affected the relationship with line management through the negative perceptions existing in their minds.

There were a number of aspects that contributed to the ineffectiveness of the performance consulting process and function. One major issue that surfaced was that of miscommunication. Neither the customer, nor the performance consultant was sure about what the function entailed or what the process consisted of. At least one customer, when asked about the Center for learning, asked “...*who is the Center for Learning*”. The majority of performance consultants have never seen performance consulting processes, or received any training in the functions of performance consulting.

Beyond this there were those who were fully aware of the function and process of performance consulting, but were more concerned with the internal problems and politics within the Center for Learning, that they forgot about the customer. “*We are in the process of transformation...*” started to become a cliché, as it was mentioned in every meeting, interview or even social gathering. The perception existed that the Center for Learning was deteriorating because of internal politics and the inability to break out of their transformational state. The core processes and systems were in place and the peripheral sub-processes should be added during the effort to serve the customer, namely line, as the need dictated it. There were pockets of excellence existing within the organisation and it has become evident that these individuals have a total customer focus. Although they were operating within the processes and systems existing in the organisation, they were achieving great successes because they were able to distance themselves from this internal turmoil.

The fact that many business units were appointing skills managers, education managers or skills co-ordinators, served as an indication that the effectiveness of performance consulting is perceived as ineffective.

The issues uncovered through this study are but the surface of the real problem. These factors are merely the result of something deeper, whether it is politically orientated or driven by hidden agendas. The result however, is clear. The customer base is highly frustrated and many business units are opting for alternative ways in getting their workforce equipped for the ever-changing task that they need to keep in touch with via training and education. Thus the appointment of education specialists in these business units.

7.8 Recommendation

Insufficient knowledge of the processes, unskilled consultants, uninformed customers, miscommunication, internal politics, and probably the most detrimental, the power games. These are contributing factors to the difficulties experienced in applying the performance consulting process. I am convinced however that these factors are mere symptoms of a more fundamental problem within the Center for Learning. There is a strategically situated problem which contributes to the difficulties experienced by the performance consultants, and the negative perceptions that seems to reign amongst the customer base of the Center for Learning. The experience, skills and knowledge is within the Center for Learning, but needs to be intentionally aligned towards the expectations of the customer. The performance consultants need to be trained and made aware of their core functions. The fact that education specialists are being appointed in line, should be an indication that line wants somebody within their organisation to address their educational needs. The Center for Learning should take the initiative to establish their performance consultants within line, serving the customer by being one with him. Relationship management are what these processes of performance consulting depends on for success. Relationships can never be established or last when two parties are divided.

Considering that these factors are symptoms to a greater problem, it is recommended that an independent task team be called upon to assess the nature and extent of the internal problems and to help them break with the internal transformational state causing the inward focus. Ultimately a research project should be launched to investigate the Center for Learning as an organisation. I believe that the research problem encompasses more than the application difficulties of one process, causing the Center for Learning to collapse into itself, instead of networking its supportive intent and expertise into the business operations.

8 CONCLUSION

The purpose of this study was stated to involve the exploration of the performance consulting process application and the possible reasons why performance consulting, as an educational process within Telkom SA Ltd. is not effective. The overview of the relevant documented business processes and its supporting literature were used to elucidate the problem which results in the dissatisfaction on the part of line management. The assumption was made beforehand that the prolonged transformational process of the organisation could be a contributing factor to the problem.

Following a qualitative research approach of observing and interviewing purposively sampled subjects, data were collected in the form of field notes and audiotaped transcriptions for analysis, using the constant comparative method in the determination of the perceptions of the subjects through their views, expectations and concerns. Validity and reliability were strived for in consciously attending to the accurate, precise, sufficient, representative, authoritative and perspicuous arguing and presentation of the research data, as discussed in Booth et al (1995:97).

From analysing this data and in presenting it, I have come to the conclusion that the areas of concern that surfaced reflected only the symptoms to a more fundamental problem within the Center for Learning as an organisation. This

study is therefore considered as inconclusive in finding the deeper reasons to the research problem and is it recommended to have an impartial body investigate the nature and extent of this deeper concern.

Resolving the organisational problems eminent to the result of application difficulties experienced in the performance consulting process, will contribute to the strategic business vision of becoming a market driven competitor in the telecommunications industry, through the performance development support by a focussed Center for Learning.



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APPENDICE 1

FIELD NOTE COMPILED FROM OBSERVATION.

Setting: Line manager's office – Telkom Towers North, Pretoria.

Date of interview: 1998/09/02

Time: 09:00 to 10:15 am

Participants: Line manager, the performance consultant and observer.

Focus of observation: The application of the performance consulting process by a performance consultant.

08:45 I meet the performance consultant in my office from where we go to the line manager's office. The consultant makes a remark that he is 'nervous' about the situation of me sitting in on the meeting.

08:57 Arriving at the manager's office. Introductions are made – it is the first time that the performance consultant and line manager has met.

08:05 A general discussion on non-related issues has commenced. Coffee and tea is offered and served in this time.

08:15 The consultant starts to explain his function as being "... the interface between CFL and line". The manager does not respond but is perceived to be sceptical (frowning).

08:20 The consultant asks whether the manager has questions – the manager replies with "will you be organising our courses?" In response the consultant says "Yes, uh, no..." The consultant is stumbling over his words and his explanation is not clear. He changes the focus by

mentioning that he first wants to explain the organisational structure of the Center for Learning.

08:40 The consultant is still explaining structure. It is perceived that the manager is agitated but polite by pretending to be interested. He answers a telephone call with a reply that he will "... be out in a matter of minutes".

08:45 The manager interrupts the explanation and asks whether he could attend a Project Management course. The focus of the meeting changes towards the courses 'needed' by the manager.

09:00 A list of seven courses has been give to and accepted by the performance consultant. The consultant explains the procedure for scheduling to attend these courses.

09:10 The manager gives an indication that he has other meeting to attend and closes the meeting by saying "Thank you for... I will however call you if I need any more courses".

09:15 The consultant acknowledges and departs.

Perceptions on observed events

- 1 The manager was accommodating but not enthusiastic
- 2 The manager appeared to be not interested (frowning, looking in diary, etc)
- 3 The consultant did not apply the process. (As it was the first meeting there should have been some sort of relationship building. A better way of meeting a customer for the first time is on neutral ground. Coffee shop?)
- 4 The manager got his way in having a number of courses scheduled without a mention of the value or performance it will address.

- 5 The consultant spent too much time explaining the organisational structure. (No mention of his function or the process he wants to implement to support the manager)



APPENDICE 2

AN UNSTRUCTURED INTERVIEW.

Setting: Line manager's office – Telkom Towers North, Pretoria.

Date of interview: 1998/09/03

Time: 11:00 to 11:45 am

Participants: One respondent (interviewee) and the researcher (interviewer).

Focus of interview: The experience of the interviewee with regard to the observed interaction with a performance consultant.

Interview conducted in Afrikaans as per the convenience of the interviewee.

Q: Eerstens wil ek vir jou dankie sê vir die onderhoud ... As ek die situasie reg gelees het toe die konsultant hier gekom het, was dit die eerste keer dat jy met so 'n performance consultant te doen gehad het?

A: Ja

Q: Wat was jou ondervinding met die konsultant gewees?

A: Kyk dit is maar oral die prosesse wat in plek gesit word maar hy lyk vir my 'competent' die ou. My indruk is hy weet waarvan hy praat en ek glo hy sal my kan help ... Ek is gelukkig.

Q: Die ontwikkelings areas wat julle aangesprek het... hoe is hulle identifiseer?

A: Ek en my bestuurder het dit identifiseer tydens my 'performance management' onderhoud.

Q: Dit is dus slegs tussen jou en jou bestuurder... daar was geen konsultant teenwoordig nie?

A: Korrek.

Q: Wat sou jy nou sien as die volgende stap?

A: Hy nou maar basies die goed terugvat na CFL toe en wat hy nou gaan probeer om vir my te source en te sorg dat ek op kursusse kom.

Q: Dink jy dit sou goed gewees het as jy so 'n profesionele konsultant saam met jou in 'n situasie gehad het met jou bestuurder ...?

A: Met Performance Management?

Q: Met Performance Management.

A: Ek glo nie.

Q: Hoekom sou jy sê-?

A: Ek dink my bestuurder is bevoegd genoeg om 'n bevel te kan vel oor wat ek nodig het en waar ek moet groei.

Q: Ok, sê vir my in jou woorde wat die funksie spesifiek van hierdie 'Performance consultant' is?

A: Ek is nie seker daarvoor nie, dit is natuurlik - ek het nie geweet hoe werk die proses nie, ek het hom gebel want ek het gehoor alles was /?/ en nie geweet met wie ek daar moet praat nie so ek weet nie wat sy

funksie is nie ... Soos ek dit sien gaan hy seker vir my die PC kursus reël die bestuurs /?!/ kursusse reël gaan hy seker vir my die kursusse soek en dit vir my bespreek.

Q: Sê nou daar bestaan nie so 'n kurses nie?

A: Dan moet hy vir my help.

Q: Dit is dan deel van sy funksie om dit -

A: Wel ek verstaan so ek weet nie of ek reg is nie.

Maar ek wil nog bysê ek het gehoor hulle is nie so gretig om vir 'n ou buite Telkom - op kursusse buite Telkom te stuur nie, dit is wat ek hoor ... Ek weet nie of dit waar is nie.

Q: Maar kom ons sê hierdie aanbieder is gelisensieerd deur 'n buite maatskappy, gaan jy ongemaklik voel as jy dink jy kan die kursus binne CFL bywoon in stede van buite?

A: Nee, dit hang alles natuurlik af van die kursus inhoud, as ek na die kursus kan sê dat ek wel iets geleer het ... het ek nie 'n probleem nie.

Q: Die volledige performance consulting proses is uiteengesit deur hierdie konsultant, maar kom ons sê /?!/ proses en jy het so tipe ou nodig - dit is om die kompetansies wat hy moet hê te identifiseer, kan jy so 'n konsultant sien in die funksie?

A: Nee.

Q: Hoekom sal jy so sê?

A: Daai ou moet permanent by my sit om daai tipe funksie te kan verrig ek bedoel dit help nie hy sit ... waar hy nou sit /?!/ werk wat hy moet doen

volgens berig wat jy geskep het moet hy hier wees om te weet watter ouens soos ek kom gereeld inlig sodat hy daai funksie vir my kan verrig. Ek kan dit self hier verrig.

Q: OK, kom ons sê /?/

A: Ek... hy hanteer opvoeding in plaas van myself en my mense en dit is 'n druppel in die emmer van wat ek doen.

Q: Het jy dit gedoen – jou eie ontwikkeling gereel?

A: Ja

Q: Ja /?/ wat hy vir jou gaan doen of wat hy veronderstel is om vir jou te doen. Wat se probleme voorsien jy dat hy miskien weer /?/ gaan kom?

A: Al wat my 'n bietjie pla is dat ek moet wag vir getalle voor ek 'n kursus kan bywoon verder ... dit kan beteken dat ek tot ses maande tot 'n jaar moet wag voordat daar genoeg is sodat die getal reg is m.a.w. dat daar genoeg mense is voor hulle 'n kurses kan aanbied.

Q: Oor hoe lang tydperk strek jou performance management kontrak?

A: Hy verval nou Maartmaand.

Q: Volgende jaar, so julle werk dit nog op 'n jaarbasis?

A: Ja, soos ek sê soos enige ding ... /?/ hierdie ou net opleiding behoeftes aanspreek.

Q: Of kan daar ander issues wees wat hy ook na kyk, of is hy net daar vir opleiding?

A: Ek weet nie, soos byvoorbeeld wat?

Q: Kan ons sê die /?/ as hy miskien met jou 'n onderhoud voer en hy kom agter iewers is daar miskien dalk 'n probleem met 'n besigheidsproses en hy weet dalk van iemand wat jou kan help daarmee dat hy daardie tipe insette vir jou kan lewer.

A: Dit is maar 'n klein gedeelte van performance.

Q: Is dit is alles te make met gevolge en oplossings wat hy behoort aan te bied in stede van net opleiding.

A: Hy verstaan nie die opset hier nie. Vir hom om sinvolle bydrae te lewer in daai rigting gaan baie lank vat en hy sal moet ... permanent betrokke wees.

Q: As ons net gou kan opsom jy sien hierdie ou net as 'n opleidingsverskaffer?

A: Ja.

Q: En dit is dit?

A: Ja.

Q: Hy moet jou behoefte vat -

A: Ja, dit is basies wat ek sê maar as ek my bestuurders byvoorbeeld sê ek moet ... hierdie tipe kurses ondergaan ons noem nie noodwendig die kurses se naam nie, dit is wat ek vir hom probeer sê ek soek so 'n kurses, dan kan hy vir my sê dit is daai kurses, net daai koppeling vir my maak.

Dit is al hoe ek dit sien.



Q: Ok. Goed so jy sal die ontwikkelingsarea identifiseer en dan kan hierdie ou kursesse gaan toevoeg.

A: /?/

Q: Enigiets anders wat jou opgeval omtrent Ari ... /?/ omtrent die proses wat hulle volg enigiets wat jou pla omtrent die funksie wat hy verrig ...

A: Ek wil hom net sien wanneer ek hom nodig het.

Q: Dit is basies - as jy hom nodig het gaan jy hom kontak en hy moet sorg dat jou probleem uitgesorteer word.

A: Ons sal seker per e-mail praat, hy het vir my die dokument ge e-mail en ek het vir hom terug ge e-mail en gesê die project management kursus wat hy /?/ op 'n later stadium /?/

Maar regtig ek kan nie sy funksie sien as enigiets anders as behalwe dit nie.

Q: Hoe gaan dit op 'n meer strategiese gebied werk as hy dalk met julle bestuurder of executive omgaan, behoort hy te kan vasstel wat die kompetencies is wat julle ouens gaan nodig hê oor 'n tydperk van 'n jaar of twee of hoe lank?

A: Ek hoor wat jy vir my sê maar hoe dit nog altyd gebeur het is dit waarmee ek nou weer sit, ons het gister 'n vergadering gehad, daar is 'n nuwe rigting waarin ons gaan inslaan ek gaan vir ... Peter bel want dit is tegnies so ...- die nuwe rigting waar ons ingaan is as tegnies identifiseer. Hy sal ons nuwe mense moet opgelei kry, nou wil ek hom kontak en sê ek wil hierdie mense opgelei hê, so ... ek hoor wat jy sê maar ek dink nie dit gaan werk nie.

Q: Die feit dat jy iemand anders weer moet kontak vir tegniese opleiding, is dit 'n probleem?

A: Nie regtig nie net solank... baie belangrik, net sodra hulle weer personeel wysig aan hulle kant en dat /?/ nie van vooraf moet begin nie, m.a.w. ek moet vir Peter ook leer ken... dit is waar ek vandaan kom, ek werk op Walker, dit is die sagteware wat ons gebruik, ons gaan hierdie kursus doen dit word net by Bateleur aangebied buite Telkom jy kan my nie intern oplei nie - my mense oplei nie, so ek wil nie weer deur daardie proses gaan as hulle van mense verwissel aan daardie kant nie. So hy moet prosesse aan sy kant dokumenteer /?/. As alles aan sy kant gedokumenteer is en hy weet waarvan ek praat dan is dit reg, ek wil net nie weer alles van vooraf verduidelik nie. So hulle moet hulleself oplei aan hulle kant en die derde persoon kan weet as ek hom bel waarvan ek praat ... dan het ek nie 'n probleem daarmee nie.

Q: Kom ons sê hulle bied 'n /?/ hulle sien die behoefte is baie groot en hulle gaan van hulle mense laat lisensieer om hierdie tipe kursesse aan te bied.

A: Ons is net twaalf mense in die hele Telkom wat dit gebruik en af en toe bedank 'n ou dit is nie /?/ oplei wat een keer in twee jaar die kursesse gaan aanbied dit is die beste, dit is hoe ek dit sien.

Q: Honderd persent maar dit gebeur soms in groter gevalle waar 'n ou ..

A: Ek het nou nou vir jou gesê Erasmus lei die Walker gebruikers landswyd op daar is 4 to 5000 van hulle. Daarmee het ek nie 'n probleem nie ...

Q: Ek dink ek het basies alles gedek wat ek wou weet, daar is net een ding wat my pla dit lyk net of die ou nie vir jou die proses wat hulle volg

uiteengesit het nie. Hy het die struktuur vir jou geskep en gesê hy is hier om jou behoeftes /?/ om opvolg aksies te doen. Dit is die vraag wat ek wou gevra het, Indien hierdie opleiding gelewer is, is heirdie ou veronderstel om 'n opvolg te doen om te sien of hierdie opleiding enige impak gehad het m.a.w. na die tyd moet hy kom en sê ok /?/ Is dit ook deel van sy funksie of dink jy dit lê ook by julle?

A: Nee ek glo dit kan sy funksie wees, want dit kan hom help in toekomstige situasies, as hy sien ek het nie baat gevind nie of kom ons gaan sien die ouens as hy sien nege ouens het nie baat gevind by die kursies nie kan hy sien daardie kursies is nie van waarde nie.

Q: Kom ons sê dit is nie 'n kwessie van baatvind nie maar dat dit dalk verkeerd geïdentifiseer is, dit is die verkeerde kursies hierdie?

A: Nee ek weet nie. Ek sien waarheen jy gaan. Ek en my bestuurder het gepraat. Hy het gesê jy kort dit, ek het gesê ek weet ek stem saam met jou. Ek stem saam met wat hy geïdentifiseer het. So ... weereens ek verstaan wat gebeur buite my omgewing. Ek het nie daardie probleem nie, so ek kan nie daardie vraag vir jou beantwoord nie.

Q: Ok

A: Dit is hoekom ek vir jou gesê het nul persent. Ek verstaan wat gebeur buitekant.

Q: Ok. So jy voorsien geen probleme?

A: Nee nie tussen my en hom nie, ek weet wat is my swak punte.

Q: /?/ tussen jou en jou ondergeskiktes.

A: Dit is bietjie moeilik want ek het tans een persoon wat lank by my werk, wat ek goed ken, die ander persone die ander vyf mense werk die langste een sewe maande by my so ek is besig om hulle te leer ken. Die persoon wat onder stress ly het ek geïdentifiseer /?/ ek probeer maar, ek kan nie sien hoe kan - kyk as ek 'n persoon inkry en ek sê kom sit in op ons performance management /?/ binne 'n uur identifiseer /?/ ek kan nie hy moet daardie persoon ken om sy tekortkominge te weet, hoe gaan hy identifiseer wat kort die ou?

Q: En as ek vir jou sê dit is hierdie ou se werk om hierdie ou te leer ken -

A: /?/ Ek hoop net nie daar is nie nog ekstra ... /?/. Jy sien die idee wat ek kry is daar is te veel mense wat ander mense dop hou deesdae. Daar word ouens aangestel om ander ouens dop te hou net nog meer en nog meer, m.a.w. die ouens wat die werk doen word net al minder.

Q: Jy sien dit kan omsit in 'n polisieering situasie?

A: Kyk wat ek bedoel is jy, dit help nie 'n ou kom in vir 'n uur en hy spandeer 'n uur nie hy sal lank hier moet wees, hoe gaan hy die ouens in elk geval leer ken /?/ ...

Q: Maar hulle het sekerlik opleidingsbehoefte?

A: Wat ons nou doen is ons lei hulle tegnies op in die eerste jaar en dan leer ons hulle ken in die eerste jaar en daarna /?/ Dit is moeilik.

Q: Ek kan jou verseker hierdie ouens is nie hier vir polisieering nie /?/

A: Ek weet nie - dit was vir my 'n verrassing toe hy sê hy wil my kom sien, ek het geen idee gehad wat sy funksie is nie.

Q: Daarop kan ek jou gerus stel hy is glad nie hier vir polisieering nie, as jy enige probleme het kan jy my kontak as ek nie die saak kan uitsorteer nie kry ek kundiges wat dit kan doen vir jou, ongeag wat die situasie ook al is, dit is nie 'n saak van polisieering nie, dit is ontwikkeling.

A: Ons het ons eie /?/ ... 'n ou weet nie aldag wat jy moet doen en praat nie daar is te veel mense, dit is wat ek probeer sê.

Q: /?/

A: Wat ek net nog wil bysê van opleiding ek glo nie my mense het probleme met opleiding binne my omgewing nie. Ek verstaan dit gebeur buite my omgewing, buite IT miskien. Die ouens word nie opgelei nie, ons stuur die ouens gereeld op kursusse, tegniese, sagte kursusse minder gereeld, maar een dametjie moes al op 'n paar sagte kursusse gegaan het maar omstandighede was van so 'n aard dat ons nie kon bekostig dat sy kon gaan nie, want ek en sy was die enigste wat hier was nou is ander mense hier en gaan dit al beter, nou kan ons daarna kyk. Ek kan haar nie net stuur op kursusse en daar is nie veel mense oor nie.

Q: Watter tipe probleme kan daar wees?

A: As 'n ou nie wil gaan nie, word hy glad nie opgelei nie, dit is wat ek hoor ek kan geen bewyse gee nie. Ek hoor die ouens sukkel om op kursusse te gaan /?/

Q: Dink jy so performance consultant kan gebruik word vir ... 'n mind set verandering, om dit so te stel?

A: Kyk dit is baie moeilik om 'n ou wat al vir jare by die poskantoor werk se mind te change.

Q: So dit is nog 'n poskantoorindroom?

A: Ja

Q: Dankie ek dink ek het al meer gekry as waarna ek soek, so ek gaan jou nie verder pla nie, ek kan dalk op 'n latere stadium terugkom na jou toe. Dit is ook deel van die konsultant se funksies om daardie goed strategies te kan gaan identifiseer en te sien kom ons kry goed gereed as daar opleiding behoeftes inkom /?/

A: Dit is op 'm hoër vlak wat hy daardie vergaderings sal moet bywoon.

Q: Daardie strategie word afgedryf na julle toe en behoort dit by julle ook te kan optel. Ons sit met 'n klomp gedagtes... julle moet dit in werking stel en hoe julle operasioneel basies een van die aspekte waarna hy behoort te kyk, bietjie meer pro-aktief en nie dalk /?/ hy moet met julle kontak.

A: Ek sal bly wees, ek kry die idee baie ouens in my omgewing ... het 'n houding van ek gee nie om nie. Ek is daai tipe ou wat sal aanhou en aanhou tot ek kry wat ek wil hê, maar ek verwag van 'n ander ou iets maar hy sal dit nie klaarmaak nie, hy commit homself nie tensy ek hom amptelik 'n e-mail stuur m.a.w. as ek 'n ou bel en sê hoor hier kan ek iets kry en hy bevestig telefonies met my en dan sal hy dit nie doen nie en integriteit in daai opsig, ek sien dit weer en weer gebeur en dit is vir my skrikwekkend. Ek weet nie hoekom moet ek vir 'n ou 'n e-mail stuur en vir sy baas copy en sê hierdie ou moet vir my hierdie ding gee en dan sal hy reageer.