Skill Practice Simulation Scenarios–Facilitator Details

For Technical Consulting

Learners were software implementation consultants

Purpose: These scenarios give participants the opportunity to wrestle with a realistic business challenge and apply the consulting skills they've learned to it.

What Makes a Good Scenario?

- **It feels like real life.** There is enough of the real work situation in the scenario that participants can quickly grasp what's going on and believe that it could be real, even if it is obviously simplified for training purposes.
- **What must be done is clear.** The situation logically suggests to the participant what has to be done to reach a resolution. Using the skills and tools they have learned, they can proceed right into the action.
- **The problem is directly linked to the instructional content.** A good scenario requires the participants to use the skills they have learned, and minimizes anything else. The simulation is focused on the practice of new skills and tools.
- **No extraneous data.** The scenario gives participants the minimum information necessary to understand and work with the situation. It allows them to infer the rest from their existing wealth of experience.

"What makes it good?" detail was provided to help the client sell the design internally.

Scenarios:

1. Project Management by Committee (Birch Leaf Printing)
2. "No, we really need it like this." (Silten Phosphate)
3. Taking Over In-Flight (Humphrey Flight Services)
4. Integration as an Afterthought (T&B Fabrication)

4 were written
1 example is shown

See the end of this document for facilitator instructions.

Performance Need: Implementation Consultants need to keep projects profitable by uncovering needs, identifying risk, and handling scope creep and extra requests. They were taught a set of 8 related skills in the workshop leading up to this final skill practice. Scenarios were drawn from the most common real-life challenges this group faced on the job.

Scenario 1—Project Management by Committee (Birch Leaf Printing)

Participant Information

This is all "Set the Stage" material, starting with the big picture, first.

Birch Leaf Printing is a mid-sized printing business with 400 employees in three locations in the Midwest United States. The company has expanded over the last 35 years through a combination of organic growth and acquisitions. Two of the locations came from purchased businesses, and each had its own finance and accounting systems. Birch Leaf desperately needs to get its financial systems in line between the locations, and AdvanceTech's TotalView is a perfect solution.

Situation context

The VP of Finance is nominally in charge of the TotalView implementation, but he has emphasized that each of the three location Finance Directors must be involved in the requirements and design. It has to be a consensus decision. After getting the project kicked off, he has handed management to the Implementation Consultant from AdvanceTech and decision making to his Finance Directors. The three Finance Directors do not see eye to eye, and each prefers a different way of handling processes and details. Each wants different step detail and ways of handling exceptions.

This lack of agreement has already pushed back the dates on the initial phase of the project by two weeks. The Directors call the Implementation Consultant directly, bypassing each other as each attempts to persuade the consultant to do it his or her way. In meetings, they start out cordial, but every session has ended up in disagreements and arguments about how the processes should work, what is best for the staff, what is really required, and what to tackle first. Time runs out, and the Birch Leaf leaders tell the Implementation Consultant to schedule another meeting to continue the discussion.

Just enough detail to work with

These three paragraphs were enough to get the learners going. They were expected to bring their own knowledge of the job to the activity. This scenario detail lets them discover, *"What is the problem we need to solve?"*

Scenario 1—Project Management by Committee (Birch Leaf Printing)

Facilitator Information

Time is Limited! The participant teams only have about 5-7 minutes for the actual conversation. This practice has to go quickly.

Behind the Scenes: The details of how each Finance Director wants the AdvanceTech solution set up aren't important. Their inability to reach agreement is what threatens the timeline and budget of the project. Ultimately, these players know that the time has come for the company to go to one system, and they are pushing for their own preferred, least disruptive (to them) details. In addition, they each tacitly fear that with this system in place, there will be no need for their roles, and they will be demoted or eliminated. The challenge for the participants is to recognize this and develop and implement a strategy for getting single, clear agreements from this trio and the VP of Finance.

How to Role-Play the Scenario

- Finance Directors are: Penny, Donna, and John
  - Penny wants very detailed setup that fits her site's existing procedures, and doesn't care much what the others want as long as her needs are met.
  - Donna wants a "normal" setup and doesn't want to spend much time on this. Her people can adapt, with training.
  - John wants to see all of the different ways the solution can be configured so he can pick the best option for each sub-component and system report.
- VP of Finance is: Jeremy
  - Jeremy wants his Directors to figure it out and come to agreement. He just wants the system to deliver on its promised forecasting value, and to have the project come in on time and budget.
  - Jeremy is willing to provide additional guidelines for his direct reports to get them closer to agreement. He is willing to facilitate, but doesn't have a lot of patience with his direct reports' "I'm taking care of my site" attitudes.
  - Jeremy is very willing to listen to the Implementation Consultant's suggestions for reaching agreement, and will support any idea that seems feasible, impactful, and timely.
  - Jeremy has no plans to reorganize the Finance structure, regardless of how well AdvanceTech's solution works. There is more than enough work—and more value-added work—to retain Director roles at each site.

> Facilitators get the "behind the scenes" story and some pointers on how the practice should play out.
>
> In this case, they needed roleplaying notes.

Activity Instructions (roughly 2 hours)

What Participants Will Do: At the end of the *Consulting Skills* workshop, participants will be in groups of 8 per table. Each table will tackle one of three scenarios.

We provided moderately detailed facilitator notes.

Activity Flow

Note: Participants are oriented to the overall simulation activity and given their sub-team assignments and scenarios at the end of Day 1 of this two-day program.

1. (5 min) Instructions
   a. Say: "Here is your opportunity to put all of these consulting skills into practice. The team at your table will receive a consulting case, and your task will be to handle the situation using the skills we have covered over the last day and a half."
   b. Make sure sub-teams are together with their assigned table coach.
   c. Recap "goal" and "flow, including that either the sub-team A or B could be called on to work the solution with the facilitators. (We use 4-person sub-teams so that all participants have to be active in the prep/planning work, to raise the energy/tension a little, and to simplify the final simulation practice at the end.)

2. (35 min) Prepare to handle the challenge.
   a. (15 min) **Come up with an approach** to the challenge in the full table group. (Also, use this time to **ask clarifying questions** of the facilitators to understand the case.)
      – What do you need to learn about the customer's "picture"?
      – Who do you want to talk with, and by what method (e.g., phone, email, face to face)?
      – What might you learn, and how would that change what you would recommend?
      – How might you present the most likely recommendations and frame the benefits to the customer (i.e., value)?
      – How will you start the conversation?
   b. (20 min) **Rehearse the approach**. Test different ways of gathering more information and handling challenging questions from team members roleplaying the customer(s), discuss. Rehearse the interaction at least twice.
      – Facilitators: Keep the practice on track while participants guess at and roleplay the parts for each other, strategizing like they would in real life. **Give brief coaching** after a rehearsal, where helpful.
      – A and B teams also need to choose their "starters" for working the challenge in the front of the room.

3. (65 min) Work the challenge at the front of the room as called upon by the facilitator. Not all tables will necessarily get to practice, depending on group size, but there should be at least one group doing each scenario. (facilitators play customer roles)
   a. (5 min) Give instructions. Each table will be called, with either its A or B team practicing.
   b. (10 min each) **Handle the scenario**. Start the conversation, clarify the customer's picture as needed, recommend how to move forward and demonstrate the value the consultant and the company (AdvanceTech) bring to the situation.
      – Facilitators: Role-play the customer.
      – Participants can "tag team" out with each other if they get stuck.
   c. (5 min each) Facilitator: Debrief each practice round with brief feedback—one strength, one stretch.

4. (7 min) Debrief the activity in the large group. (Spend more time on this, if possible! Recommend 15-20 minutes.)

In this case, facilitators were already very comfortable giving feedback on these skills. In other cases, we might provide a list of "success criteria" to help them guide the debrief.

5. (8 min) Action planning: Use handout to capture a skill-related "stretch" each participant will make, by when, and collect information to send post-session reminder texts to their mobile numbers.