

# The Right Way to Tell Clients They're Wrong

Training professionals have an obligation to the organization to pursue the best option...and that might mean pushing back earnestly, tactfully, and from an informed position. **BY MICHAEL ROSENTHAL**



**Michael Rosenthal** is managing partner of Consensus ([www.consensusgroup.com](http://www.consensusgroup.com)), a negotiation and conflict resolution firm headquartered in New York and with regional offices in the Middle East that offers an array of services through three practice areas: Consulting, Training & Development, and Peace Building. For more information, contact [mrosenthal@consensusgroup.com](mailto:mrosenthal@consensusgroup.com).

**Q** I am a training manager who supports our organization's most profitable business unit. Sometimes, clients—senior managers who yield a lot of power within the organization—come to me with a problem they are facing and insist on a particular course of action they believe will address their need, but I disagree with. Yet, even though I am supposed to be the Training & Development expert, they don't seem to listen. How can I push back and get them to listen without coming across as being insubordinate or difficult?

**A:** First off, you're not alone. Virtually every training manager has faced a client who insisted on prescribing his or her own intervention instead of following our recommendation.

Thus, one step is to realize that there's a systemic tension, something that almost automatically occurs between the roles of training advisor and internal client. You, as the advisor, know the ins and outs of professional development at least as well as your clients. Conversely, your clients know their business, their people, and, arguably, their objectives at least as well as you.

So begin by suspending the question of "whose knowledge and expertise should yield more weight in the decision of what to do?" Instead, recognize that it's not personal—try to move away from the paradigm of "my client is a know-it-all jerk" to "by virtue of our different roles in the organization, my client and I are inclined to see things differently regarding whose information better informs this training decision."

Now, instead of taking steps to prove your recommendation should be adopted, step back and, together with your client, explore the merits of the various options. Use a conceptual tool such as the Ladder of Inference developed by business theorist Chris Argyris. Acknowledge

that you, like your client, only have processed a subset of the data available that could inform the decision. Also be aware of the assumptions you and your client each attach to your respective data sets, based on your personal experiences, education, philosophies, and biases. Finally, realize that your conclusions and recommendations are based on the different data sets and the different assumptions.

So, instead of having a conversation centered around your respective conclusions (i.e., we should proceed this way or

that way), begin by sharing the data you each find relevant, in turn increasing the shared data set. The addition of new data could influence your opinion, theirs, or both of yours. Next, discuss how each of you interprets the data. Be genuinely open to their analysis, and, hopefully, you'll find them being more open to yours. Last, based on a more robust data set and a more thorough exploration of different interpretations, together decide which option is best.

Be aware of and sympathetic to your client's potential assumption that we "training people" don't really understand or focus on the business case. Of course, that probably isn't an accurate assumption. But in the past, your client might have dealt with training professionals who didn't care about the business case or, more likely, failed to effectively communicate their understanding of and pursuit of the business case. So be sure to tie the proposed options to expected business results and also indicate how you will measure success.

Last, show respect throughout, but don't confuse respect with blind deference or obedience. You have an obligation to your organization to pursue the best option...and sometimes that means pushing back earnestly, tactfully, and from a truly informed position. **■**