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Marketing and Consulting in Organizational Behavior Management

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ABSTRACT

One of the greatest challenges in business consulting is to help clients quickly grasp how the products and services you offer will improve their organizations. As businesswomen whose adult lives have been spent implementing behavioral solutions in large companies and complex organizations, we have amassed experience and advice for those who seek to help others achieve sustainable improvements through behaviorally based solutions. It starts with getting them to understand and believe in what you are proposing. This paper outlines advice and strategies gained over three decades of marketing and implementing behavioral solutions in large organizations.

KEYWORDS

Marketing OBM; selling behavioral solutions; performance management

Part 1: To succeed in OBM, you must continuously adapt!

When we started the Continuous Learning Group (CLG) in 1993 (renamed ALULA in 2018), we could not use the word “behavior” with our Fortune 500 clients. They reacted to it negatively at a visceral level. It conjured up everything bad they thought about behaviorism. Organizations were moving away from command-and-control leadership structures toward self-directed work teams. Behaviorism flew in the face of all of this, especially when people heard the terms “consequences,” “reinforcement,” and “punishment.” They immediately thought about behavioral programs for children, not programs to empower employees. Our scientific terms got in the way of market acceptance. So we pivoted.

In one of our first corporate leadership training programs, we renamed the ABC analysis as the “APC Analysis.” The “P” stood for Performance and included both the targeted result and desired pinpointed behaviors. Trained as behavior analysts, it seemed almost shameful to us at the time, even though Gilbert (1996) insisted that we focus on “worthy performance” instead of continuing the “cult of behavior.” And, as you might expect, we received considerable criticism from the behavioral community. But it resonated with our clients – and that is what counted. Keeping clients’ preferences at the forefront continues to be paramount.

Thankfully, today – now nearly 30 years later – the word “behavior” is mainstream and widely accepted, so we no longer tap dance around that concern. While the specific example of “behavior” versus “performance” is no longer relevant, our main point is key:

You must continuously adapt the way
you market and deliver OBM consulting services
if you want to earn a seat at the table!

At CLG we followed this credo religiously. In fact, our company was originally named the Continuous Learning Group because we knew we would have to constantly experiment and adapt OBM methods if we wanted to “earn the right” to help clients improve results at scale.

Being agile and adaptive were our core values, and they served us well time and again. We wanted to be a group who continuously learned and got better with each application – a truly “Continuous Learning Group.” However, in the mid-1990s, “learning” became synonymous with “training” – and prospective clients would say, “Oh – so you are a training company.” Egad, no! And so, we changed our company name to just CLG – and then if people asked what “CLG” stood for, we could give them the correct answer that fully described our capabilities and service offerings.

They rarely asked.

And they stopped assuming we were a training company.

Over time, CLG evolved into a premier behavior-based strategy execution firm with offices and clients around the world. When we started the company, we never dreamt that our little firm would someday compete with the big consultancies such as McKinsey and Accenture on project after project – and win bids against them. But we did. Applying the principles of applied behavior analysis worked. Clients saw it; they appreciated it, and they rewarded us with more and more business.

Results alone aren't enough

About 10 years into CLG, we believed that we scored these wins by showcasing the impressive results our clients achieved using the science of behavior analysis. However, once the Internet became widely available, it was clear that a proven track record of results was not a differentiator. Many others claimed the same thing. It just gave us the right to compete. Every consulting firm touted its ability to get results. Sadly, the thing that we love most about our science – the ability to reliably produce results – clearly was not a differentiating reason to hire us. It was just expected, and others could do it for them too.

Clients still cannot differentiate behavioral approaches

Lauding our scientific foundation in behavior analysis was not enough either. As we won contracts against bigger consulting firms, many of them quickly adjusted by saying that they too offered “behavioralists.” They even began to embed our exact ABC slides into their presentations! They brazenly told potential clients that they addressed both behaviors and mindsets, which they said was more comprehensive than the simple, temporary behavior change approach offered by CLG.

Throughout, we gritted our teeth and reminded ourselves that imitation is the highest form of flattery. All the while, we worked feverishly behind the scenes to create ways to differentiate ourselves – to stay agile in addressing market trends while remaining true to the science that brought our clients such success.

You need more than a proven science and results

In this paper we capture our top lessons learned as we worked tirelessly to create a market for OBM. We share these lessons with the hope they will reduce your “travel time” to becoming a trusted OBM consultant to the clients you want to serve. Our hope is for more behavior analysts to hang their shingle or join forces with other behavioral firms to enter the exciting, rewarding world of OBM consulting.

We know that there is a big leap between applying the science at an individual level versus at-scale in organizations. Many of us in the field have had to pioneer ways to do that. While it would take a lifetime to capture all our lessons learned, we have identified seven that are extremely important in learning how to market and deliver OBM. The lessons in Part 2 will help you market your skills. The lessons in Part 3 will help you become a trusted advisor (consultant) to your clients.

Part 2: Marketing organizational behavior management consulting services

We coauthored a chapter entitled “Marketing Behaviorally Based Solutions” (Braksick & Smith, 2001) which extensively details strategies for marketing behavioral solutions – beginning with researching background and competitors, through to writing the proposal. We will not repeat that information here, but encourage readers interested in that level of detail to consult that chapter. While strategies have evolved with social media and the Internet, the core principles and guidance still apply. Below we share our three top lessons learned since then that, along with the content of our previous chapter, guide our approach to marketing today.

For quick reference, the three lessons are:

Lesson 1: Match your market with your personal passions and ability to get results.

Lesson 2: Reframe Behavior Analysis in a way that resonates with your target market.

Lesson 3: Differentiate your OBM products and services from the competition.

Lesson #1: Match your market with your personal passions and ability to get results

We all have things that we are passionate about. The two of us loved solving complex organizational performance problems. We both had backgrounds in industrial engineering and systems analysis, so the more complex the challenge, the happier we were. If a client was trying to consolidate a global customer service operation into one site, we were all over it. If a global pharmaceutical wanted to become more “patient-focused,” we helped turn that abstract concept into specific business-critical actions at all levels, linked to measurable outcomes. If a client wanted to improve their culture and results to impact their relative competitive position in the marketplace, we were their choice to make this come alive at all levels through new behaviors.

We chose Fortune 500 companies as our target market because they have no end of big, messy challenges, and that is where CLG lived. The more complex, the better. Bring it on.

What is your passion? Is there a market opportunity where you think you can make a big difference using OBM? Maybe you are a skilled BCBA looking for a new career direction. You have ideas on how to help autism services agencies improve the overall experience for employees, clients, and families. Or perhaps you are a seasoned Lean Six Sigma consultant who has seen how OBM can turbocharge process implementation. Maybe you are a student just learning about OBM and want to try implementing it at a local animal shelter or organization in which you are a member.

Research the market that captures your interest. As a consultant, your first job is to determine whether your target market will pay for OBM services. Will your services provide relief for their specific pain points and improve their specific targeted results? Is the market big enough for you to repeat these successes, client after client? You have to do the market research to get answers to these questions. It’s not an easy task, but you need to take it seriously – as if your financial well-being depends on it – because it does, if you want to be a consultant.

SAMPLE ASSESSMENT FACTORS	ASSESSMENT	OBM OPPORTUNITIES?
What is the market size?	<ul style="list-style-type: none"> • 35,600 stores • 100 employees per store • 20% supervisors; 80% crew members 	High—a proven approach could be scaled across the industry.
Which results are adversely affected by unwanted behavioral variability?	Metrics related to: <ul style="list-style-type: none"> • Food safety & quality • Customer service • Employee turnover 	High—the key behaviors that we can impact are...
How are employees trained?	<ul style="list-style-type: none"> • Rigorous training modules, procedures, and checklists 	Low—OBM won't add a lot here.
How is individual employee performance reviewed and coached?	<ul style="list-style-type: none"> • Left up to the skills of individual supervisors and trainers 	High—coaching skills vary widely.
Who are the potential buyers?	<ul style="list-style-type: none"> • Individual franchise owner • Corporate store operations and training departments 	Medium—Fragmented decision making between franchise owners and corporate.
What is the Return-On-Investment (ROI) buyers should expect?	<ul style="list-style-type: none"> • Employee turnover costs \$75,000 per store (based on 150% average annual turnover, \$500 to replace an employee). Cut turnover by 50% to save \$37,500. Price OBM services at \$5000/store for an ROI of 7.5. 	Medium—many owners don't think OBM will reliably decrease turnover. Need to prove.

Figure 1. Sample questions we ask when assessing a target market’s OBM opportunities. (© 2021 Performance Ally)

Begin by searching the Internet to get answers to the types of questions shown in the first column of Figure 1. If direct queries do not provide all the answers, look for industry-specific research articles, magazines, or even books written by leaders of that industry. Go to Glassdoor.com to read employee reviews.

No matter how much reading you do, always talk with people who can help you better understand the market. Consider finding a mentor who can guide you. Oftentimes, retired consultants – especially in OBM – love sharing their hard-won learnings to help the next generation. Talk with leaders and employees in that industry or market to validate and expand your findings.

For example, one of the authors recently was interested in supply chain issues for big box and small box retailers. After doing her online research, she sought out “friends of the family” who worked in supply chain, specifically in the task of loading trucks at the warehouses and unloading trucks at stores. These people included a supervisor, a corporate supply chain person, and a frontline crew member. In separate interviews totaling 90 minutes, she had enough information and stories to clearly understand the pain points and opportunities.

Here are the interview questions she used:

A. What are the Key Performance Metrics for the Warehouse, and Specifically for the People who Pack the Trucks?

One major metric focused on “packing quality” for each truck. This metric measured whether the trucks had the right items loaded according to specifications, so they would be easy for the stores to unload.

B. Is there Variability in the Actual Performance Results for this Metric?

Yes, an auditing system revealed that only 50–85% of trucks were packed properly at any point in time. The receiving stores often found the trucks to be a “mess.” For example, sometimes heavy items were stacked on top, crushing lighter items below such as dish soap, which then had to be mopped up at the receiving end.

C. Is this Performance Variability Causing Problems (e.g., Costing Money, Making Customer Angry, Holding Up Other Parts of the System)?

Yes, a truck could take 1–3 days to unload, depending on how well it was packed. Money is lost when products sit in trucks and not on store shelves.

D. Do Warehouse Personnel Know What to Do to Achieve a High-Quality Result Every Time?

They receive extensive classroom training followed up with structured on-the-job training. There are also numerous procedures and checklists in place to guide them in loading trucks.

E. How Do Employees Know if They’ve Done a Good or Poor Job?

Employees receive daily reports on overall packing quality for the warehouse, based on the audits for the previous day. They also see trend data. In addition, bonuses are tied to these audit results. Individual employees receive personal feedback only when their supervisors audit a truck, which was infrequent.

One big box retailer added one trainer and one auditor at each of its 50 + distribution centers to increase the frequency of audits. “Packing quality” results did not improve. Frustrated, receiving teams in stores took pictures of poorly packed trucks, which then made their way around the company. This “feedback” embarrassed and angered the warehouse teams but had little effect on performance.

F. What Things Helped or Hindered Employees from Doing the Right Things?

The answers to this question were general. This isn’t unusual when people don’t know about behavioral causes of poor performance. The top answers were lack of accountability, weak coaching by leaders, and little to no teamwork. Clearly individual feedback loops were broken, but what else? The author made a note to remember that a more detailed behavior analysis was

needed, with other people being involved, to better understand the antecedents and consequences that helped or hindered high performance at the system, process, and individual performer levels (Rummler & Brache, 1995).

Do you see opportunities for an OBM intervention here? Of course! What about finding potential clients in this industry? That is another question that must be answered. Who are the buyers? What will they buy, and why? When do they make purchasing decisions? How much can they spend? What else are they considering as a solution? Can you sell a pilot project with a company to prove that your OBM approach works?

After all this research, if your chosen market or specific industry is still attractive to you, the next step is to configure and price your services. Let's use a fast-food example. We've simplified it to make our point about how to charge for your services. Say you want to make at least \$120,000 per year. To get going, you decide to charge \$20,000 per project because you believe store owners have discretionary funds for a project at that level of investment – but only if it helps them realize even more profits.

How did you determine this? Your research uncovered the average profit per store is \$150,000 on sales of \$3,000,000 (a 5% profit margin). You've identified one area where OBM can lead to even more profitability: reducing turnover. Research shows that employees leave bad leaders, not organizations (Clifton & Harter, 2019). What if your services helped supervisors reliably deliver the magic ratio of 5:1 positive-to-constructive feedback to measurably improve employee retention?

Let us show you how you can pull it all together into a compelling story for the owner. Say that there are 100 employees in each store, with 100% turnover per year. It costs \$2,000 to replace each employee. That means the owner is spending \$200,000 per year on turnover. If your solution can reduce turnover by 40%, you will save the owner \$80,000. The return on investment (ROI) is 4. Here's the calculation: $\$80,000$ (the return) \div $\$20,000$ (the investment) = an ROI of 4.

This is a decent ROI, but most buyers of consulting services are looking for an ROI between 5 to 10. So, keep looking for other performance improvement opportunities to see if you can meet their threshold.

The point of all this analysis is to help you structure your product and service offerings to meet the business needs of the client. Perhaps you feel that you can best improve the store's performance by providing direct consulting support: first training leaders in OBM, then following up with on-site implementation and coaching support. Price that and then paint the picture of exactly which performance targets you will help improve.

Once you've conducted a successful pilot (sometimes done at a reduced cost as a proof of concept), then sell your services more broadly. Hopefully you are successful in your sales efforts, securing the 6–10 clients per year you projected in your business plan. But, what if the market reception is poor? Don't give up – it's time to pivot! Here are three possible ways to pivot:

1. Become a Specialist

First, look more closely at the performance data your potential clients most care about. Is there an improvement area where you could specialize and guarantee results improvement? For sales in fast food restaurants, is every person who takes customer orders also recommending additional items? If the store could get 100% of employees at the cash registers to do that for 100% of the orders, would this reliably improve day sales?

2. Change the Way You Deliver Your Products and Services

The second thing you can do is consider another way to “package” your products and services in this market. Maybe they don’t want you hanging around while they are trying to work. Rather than direct consulting, you might combine online learning and remote coaching with use of an “OBM-compliant” app. This is an app that provides a way to measure vital behaviors, links those data to targeted results, and organizes it into daily performance feedback for individuals and teams. One example is Squadle, which focuses on behaviors employees need to do to ensure food safety. The app provides the necessary behavior-to-results data we require in an OBM intervention. There are also several apps for Behavior-Based Safety that do the same thing.

What these apps lack is a way to ensure that high-quality coaching is delivered by leaders to help employees improve. As a result, the data integrity often gets compromised as employees enter false data to avoid punishment. You could help make these apps more effective by ensuring great leadership coaching is occurring. You could do this remotely through 1:1 coaching of leaders and in-person reviews with the management team. We see that model working in our field. It has become even more relevant in remote working environments.

3. Pivot to Another Target Market

Third, you might decide that there is no viable opportunity in fast food. Pivot and start working through the same analysis for other markets that you are considering.

Remember, your goal is to find an industry that you are passionate about serving, one that wants and needs OBM services. Then, find a friendly pilot site to prove and refine your approach. Once you have your product and services configured to reliably produce results, scale up to other clients in that industry, knowing that your pilot site will provide a glowing reference.

Lesson #2: Reframe behavior analysis in a way that resonates with your target market

Since our target market was Fortune 500 companies, we found we had to repackage behavior analysis in a way that met our clients' preferences, not our needs as scientists or purists.

Our goal was to engage decision-makers, leaders, and employees early in our projects, confident that once they saw the results of our work together, they would want to know more about how we achieved those results. With many clients, our gamble paid off. Big global clients chose to immerse themselves in the science so they could sustain the gains. Those were some of the most rewarding times for our consultants, and the experience emboldened us to lead with the core science with other clients. We tried hard to make the core concepts and terms as accessible as possible, both verbally and visually, through memorable models, videos, acronyms, etc.

Over the years we embedded the behavioral core into many specific business applications while staying true to the principles, techniques, and terms of the science. We called these consulting offers “wrappers.” They included services such as Behavioral Lean SigmaSM, Behavior-Based Forecast Accuracy, and Behavior-Based Execution Excellence. For these wrappers, we included evidence-based behavioral checklists and coaching processes. In addition, we trained users in only the most basic principles of behavior analysis, just enough that they understood the importance of consequences and how to discuss behavior objectively. These wrappers allowed us to reach multiple markets and decision-makers to showcase unique breakthrough applications of the science.

We are still learning ways to make the science more “user-friendly.” One way is to create “like-a’s” where we help people understand how OBM is “like” (very similar) to other performance improvement and management systems. For example: “OBM is just like your LEAN management system, in that it has a proven framework that everyone can use to quickly address unwanted variability to produce results at scale. Whereas LEAN reduces unwanted process variability, OBM reduces unwanted behavioral variability.”

One of the authors, Dr. Julie Smith, has presented and written extensively on this subject, even going so far as to create a management system framework for OBM that is just “like-a” frameworks for strategy and process management systems (Smith, 2016). These frameworks contain core definitions, how the management process works, core tools, commonly accepted metrics, and overarching principles. [Figure 2](#) shows an example of the core framework developed by Dr. Smith's current company, Performance Ally.

FRAMEWORK FOR BEHAVIOR-DRIVEN EXECUTION



Definition of Behavior	Behavior is everything people say or do that can be observed by others (customers, peers, leaders, etc.). Vital Behaviors are those critical few things that people can do to accelerate the achievement of strategic results.
Definition of the Management System	The behavior-driven execution management system aligns the vital behaviors of leaders and employees with strategies, processes, and business plans to achieve targeted results. It can be implemented as an ongoing operational system and as a project-based system. It provides consistent management practices to encourage vital behaviors until they become habit across large numbers of employees.
Sample Principles	<ol style="list-style-type: none"> 1. Human behavior underpins the achievement of all targeted results. 2. Some behaviors are more critical than others in producing results (Vital Behaviors). 3. Unwanted behavioral variability of Vital Behaviors can be the root cause of poor performance. 4. The goal is 100% adherence to Vital Behaviors for every opportunity to do the "right" thing. 5. Vital Behaviors can be objectively defined, measured, and observed. 6. Vital Behaviors can be understood and changed by analyzing and changing environmental factors that come before them (Antecedents) and after (Consequences).
Sample Metrics	Successes per million opportunities to do the "right thing" (i.e., Vital Behaviors), Individual Habit Strength Index™, Organizational Behavior Momentum Index.
Sample Tools	Behavior-Driven Execution Model, Behavior Blueprint Configuration, Vital Behavior Crowdsourcing, Performance Coaching Conversations, Behavior SCAN, BASICS of Behavior-Driven Continuous Improvement, Behavior Boosters and Barriers.

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Figure 2. Sample core framework for execution (“like-a” framework for strategy and process management systems). (© 2021 Performance Ally)

You will need to figure out how to present OBM in a way that resonates with your target market, similar to the examples just shared. If you plan to provide OBM services to schools, autism services agencies, or prisons, you will not need to make many adjustments, because these entities have already accepted the science and terminology.

If you hope to work in healthcare organizations, do research on how others have positioned organizational behavior change and how they talk about it. Quint Studer was an extremely successful healthcare consultant. Study one of his books (Studer, 2013). You will quickly see that his background is in behavior analysis. He successfully “packaged” the science in a way embraced by healthcare leaders. Most importantly, his consulting firm has had a huge impact on the quality and safety of care delivered across the world. He provides a shining example of how our science can be adapted to have a broad impact on a market.

You will have to find out what you are comfortable doing and what will resonate with your potential market. Remember, you will always be competing with others who have stripped our science to its most elemental, accessible form. For example, some popular behavioral science authors have changed the ABC Analysis into “Triggers, Behaviors, and Rewards.” It makes sense to lots of people. More and more “behavioral experts” are entering our space from all sides. It is key that we demonstrate flexibility in how we talk about the science if we want to have a broad impact in organizations.

Lesson #3: Differentiate your OBM products and services from the competition

Most organizations have a multitude of ongoing performance improvement programs and management systems. When you approach them about OBM, they will put it in the framework of their “like-a’s.” You might hear, “We already have a real-time feedback app that employees can use to get feedback anytime they want.” Or “Our goal-setting process cascades to the individual work unit level so everyone knows what they are supposed to do.” Another frequent one is, “We hold morning huddles, so team members are aligned on what needs to be done that day.” You’ll also hear, “All of our leaders have been trained to coach, and they are required to meet monthly with each employee to discuss their progress.” So, how do you respond?

There are two different strategies you can take.

1. Explore Whether These Systems Are Working as Intended

For example, do they know if their real-time feedback app has improved employees’ performance or engagement? Do they have a true understanding about the frequency and quality of coaching provided by their leaders? Does the coaching have an impact on performance or employee satisfaction? If they went into a work unit and asked people to describe their goals, would they get consistent answers?

You get the drift. As behavior analysts, we all know these systems often are not executed properly. Let your prospective client know that they are not alone if they are struggling to get people to use these systems to optimize performance. Share how OBM can help these systems to be executed in a way that will have a *measurable positive impact* on both organizational performance and workplace culture.

2. Focus Directly on How OBM Differs from These Systems

Stress that, while these existing systems are extremely important, they tend to focus on individual and small-team contributions. OBM, on the other hand, is about getting collective vital behaviors aligned and motivated at scale to achieve a whole new level of results. It is perfect for situations where behavioral variability is costly to the organization – e.g., agile software development teams consistently missing requirements; healthcare providers delivering an inconsistent patient experience.

Explore these core differentiating features *of OBM* to discover where the client sees opportunities for application:

- (1) Targeted business result(s) that are adversely affected by unwanted behavioral variability across large numbers of employees.

- (2) Key performer groups whose behavioral variability most affects the result(s).
- (3) Mission-critical vital behaviors for each key performer group.
- (4) Behavior sampling of individual key performers to measure whether vital behaviors are occurring when they are supposed to occur.
- (5) Ongoing performance feedback – to individuals, teams, and organizational levels – that links changes in vital behaviors to changes in results.
- (6) Frequent, high-quality performance coaching for individuals that measurably helps vital behaviors become habit.
- (7) Barrier removal at both the system level and situational level.

We worked with a global food company that would always say, “We want our share of stomach.” For OBM, we should be thinking, “We want our share of budgets,” especially those allocated to performance improvement. It is important to never denigrate other systems that companies are currently using to influence performance. Some decision-maker in the organization chose to invest in the system, and the system is likely to be contributing positively somewhere. Plus, that decision-maker might resent criticism of their selected system.

Often, we had to soften the behavioral part of our work, or the “standalone” nature of it, or even what we called it, to ensure it integrated well with other things the company had underway. We often found success by positioning OBM as a means of turbocharging all other management systems, causing them to be implemented more quickly, achieve results faster, and sustain the gains.

Assume that all your research and marketing efforts lead to a signed proposal. Congratulations! Take time to celebrate. Then prepare yourself to deliver on your OBM promises. That requires excellence in consulting delivery. Let us explore this further in the next section.

Part 3: Delivering organizational behavior management consulting services

We must accept the fact that most of the world does not know that behavior analysis, the science of behavior change, exists – let alone, what it is. As a result, people and organizations do things that are highly inconsistent with what the science teaches us.

For example, as we well know, organizations and leaders are very antecedent-oriented. *Tell employees what we expect. Train them. Set clear goals. Provide clear instructions. Show them. Have them take a class. Laminate the job aids and targets so they can have them on hand.* Not a consequence in sight!

It is understandable: they can control the timing and administration of antecedents, and they are immediately visible. With consequences, we have to wait for the behavior to occur, and show how it links to our efforts. But make no mistake. If you are a behavioral consultant, you are signing on to be more than just a trainer, more than just an antecedent provider. You are burdened with the knowledge that antecedents are necessary, but insufficient, to achieving lasting behavioral change. Welcome to consulting vs. (just) training!

Below we share our four top lessons learned that guide our approach to delivery today. For quick reference, they are:

Lesson 4: OBM consultants are hired to help change behavior; antecedents alone are insufficient.

Lesson 5: Always approach your consulting engagements with a perspective that is Outside→In.

Lesson 6: Turbocharge your OBM expertise with top-notch consulting skills.

Lesson 7: Care. Really care. Show you care.

Lesson #4: OBM Consultants are hired to help change behavior; Antecedents alone are insufficient

The big consultancies wanted badly to get into behavior change so they could expand their client work beyond strategy development and into strategy execution. First, they lifted our materials, then they hired some of our most senior people. Lucky for us, delivery excellence in our field requires having core competence in behavior analysis as an entire enterprise, not in having a few slides that convey the concepts or individuals who possess behavioral expertise.

An analogy would be if Microsoft tried to improve its user experience by hiring a couple of Apple's top user-interface designers. That strategy simply will not work: Microsoft's core competence is in developing software that allows individuals and organizations to be more productive and engaged in their work, not in creating an amazing user interface. In the same vein, the big consultancies have struggled to deliver our behavior science because their core competence is in delivering antecedent-based solutions. They simply do not yet know how to pinpoint business-critical vital behaviors, nor align consequence-based solutions at scale across an organization.

Consulting with OBM solutions means you are committing to the road less-traveled – to impact both antecedent and consequence systems. Consulting means you will help your clients until they achieve desired results and sustain new habits deep in the organization. It means you are a business-minded change agent and not (just) a captivating, entertaining trainer. Changing

behavior takes real work. We lost out to “charming” and “entertaining” trainers more than once . . . but rarely for long. Clients quickly saw the shallowness and insufficiency of that approach – and knew they needed to produce new results, which required new behaviors. They knew we could help them get there.

Lesson # 5: Always approach your consulting engagements with a perspective that is outside→in

One of the most important aspects of successful consulting is perspective-taking: seeing the client’s situation through *their* eyes – but from the outside→in. Understand the problem through their eyes, how it manifests itself, how others experience the company’s products and actions – versus jumping to your own impression or analysis. Doing so requires you to speak the client’s language and develop your intervention within the client’s framework. Even when you present what you will do for them, do not outline it in terms of what you will do: tell them what they will *experience*.

For example: You have been hired to help senior managers improve their leadership skills so they can help drive improvements in business and culture. Rather than proposing something like “We will provide three training classes of 3 hours each, followed by 1:1 coaching with one of our coaches, using our handbook of . . .,” describe your proposal this way:

“Your leaders will drive improvement in business performance and changes in the company’s culture by how they lead others. To improve their leadership skills, they will engage in three group learning events (each about 3 hours), where they will improve their skills and meet other leaders. Next, they will have 1:1 time with a seasoned coach to focus on any development area where they’d like with help. Finally, they will be asked to “catch each other doing things right” – which means giving positive feedback when they see colleagues engaging in leadership behaviors consistent with those we discussed in class. They will bring those examples to each class to share as leading indicators of culture change at work.”

The first example is backward: inside→out . . . what you will do to them. The consultant is the centerpiece of that story: what you will do to them. But the second example is outside→in: what *they* will achieve and how *they* will experience it. The second example places the client at the center. That is how it should be, always.

Effective behavioral consulting is *always* outside→in. It shows a focus on the customer’s experience, and not on you as the interventionist. The outside→in understanding should be reflected in your marketing materials, your proposal, communications materials you draft for the client, and how you speak with them. People do not want to be “done-to.” They want to be lifted up, helped, supported, and encouraged. Your language matters.

Nowhere does an outside→in orientation show up more than in establishing project goals and success metrics with your client. As consultants, we often evaluate our interventions on five levels:

- (1) *Personal impression: Did the client enjoy it?*
- (2) *Learning: New insights and skills the client acquired.*
- (3) *On-the-job performance: New behaviors evidenced on the job.*
- (4) *Business impact: New behaviors driving metrics important to the business.*
- (5) *Return on investment: Was the program a good investment?*

All well and good, but: the only results and measures that matter to your client are *results and measures that matter to your client*. Client-centric, in other words. To be outside→in and client-focused, start with understanding the company and key business information. There are some important things to do upfront and in your first client session that demonstrate your client focus, your outside→in orientation, and help ensure you deliver with excellence against the client's expectations. Here is our advice.

Before your first meeting with a client

- (1) *Gather industry information (see Dun & Bradstreet and IBISWorld for high-level and detailed reports).*
- (2) *Gather information about client's competitors (Owler and Crunchbase are particularly helpful websites).*
- (3) *Gather background information on the client:*
 - (a) Read the company and organization's most recent annual report.
 - (b) Review marketing information available online and on their website.
 - (c) Review bios of top execs and clients with whom you will be working.
 - (d) Review employee engagement data and Glassdoor ratings on the company.
- (4) *Use the information you gathered from your industry analysis to draft possible measures of success and an ROI for your work with this specific client.*
- (5) *Practice briefly introducing yourself, especially your unique credentials, relevant project successes, and experience in working with the types of people who will be in your first meeting. Clients want to know they are in good hands.*
- (6) *Practice presenting the project approach described in your proposal. Get feedback from friendly colleagues on how you can make the presentation as helpful and informative as possible.*

For big proposals, we would spend days preparing our team to meet with the client for the first time. But as we grew, some consultants became too confident and comfortable, thinking that the behavioral approach, our results, and a signed proposal would carry them through the first session. They would not put in the time. Today's clients expect that you did your background research. No one wants to waste time bringing their consultant up-to-speed on things that are readily available to the public. When clients saw this level of sloppiness, they felt the consultant was either lazy or arrogant; they would ask for someone else. Do not make this mistake.

During your first client session – set the stage for longer engagement and relationship

You have sold the project, most likely to someone high in the organization. But now you need to develop enduring relationships with the people who are responsible for carrying out the project. Even though you have gathered extensive information about the industry and the business challenge that your proposal addresses, you do not yet know the perspectives of the individuals with whom you will work daily. During the first client session, your goal is to draw out their perspective, not just share what you think needs to be done, or that the proposal is a “done deal.” Remember, Outside→In!

Share backgrounds

- (1) Establish business context and history of the project (e.g., what else has been tried? How long has the business challenge been an issue?).
- (2) Explore objectives and note what success will look like from a variety of perspectives inside the organization (e.g., executives, frontline leaders, employees, support functions).
- (3) Provide education through slides that describe your approach.
- (4) Discuss project roles, including your own.
- (5) Request names and brief background on key people with whom you will interface.
- (6) Identify the administrative contact person and ask to meet them so you can establish a relationship. This person will be key to your success, as they are the gatekeeper for scheduling meetings, securing e-mail addresses, getting quick access with executives, etc. Treat them well, as they will broadly share what you are like and whether you “live” the positive behavioral approach you are selling.

All subsequent sessions – ensure alignment on the success metrics from the client’s perspective (with your expert guidance)

There are so many things that you will be focusing on as your project unfolds, but job #1 is to get alignment on the success metrics that mean the most to your client – and exactly how they will be measured. Approach this task as if you were putting your fees at risk: *If I don’t produce the results we agreed on, I will reduce my fees by x%.*

Results that count to the client generally are those where the client makes money, obtains money, saves money, builds capacity or potential, protects or enhances their mission, minimizes risk, or saves nonrenewable time.

Examples:

- Profitability
- Share price
- Talent retention
- Time-to-market
- Industry rankings
- Sales per customer
- Test scores
- Grant/contract acquisition
- Operating costs
- Promotion rates
- Litigation costs
- Market share
- Innovation/product development pipeline
- Customer retention
- Compliance/audit reviews
- Credit rating

As behavior analysts, we often worry that we do not understand the world of business metrics. Do not fret about that. We have found that leaders and employees at all levels often do not understand how their core metrics are gathered, calculated, and disseminated.

For example, we worked with a global company to improve forecast accuracy. Early-on we found that key people – executives, and their expert consultants in forecasting, and the thousands of forecasting teams across the organization – were not aligned about how to measure the very thing they were most concerned about – forecast accuracy – especially at key steps of a repetitive monthly process. Our job was to bring clarity and alignment, as well to add the behavioral metrics that provided early indicators of success or failure, so action could be taken to produce an accurate forecast. During that time, we asked all the “stupid” questions multiple times and of multiple people, to see where the misses were occurring.

Our point: you do not have to be a business metrics expert – your clients are the experts. Your job is to help them clarify the success metrics so everyone understands the business targets and how they can contribute to achieving them.

Lesson #6: Turbocharge your OBM expertise with top-notch consulting skills

Your training in OBM is just the beginning of an exciting journey. To be successful, you will need to develop consulting skills too. We asked our consultants to read Peter Block's *Flawless Consulting* (Block, 2011), regardless of whether they had a consulting background, because it helped align us on how to become high-integrity consultants.

One of our clients required all our consultants on their projects to become certified by the International Coaching Federation. While initially we thought it would be a waste of time, it turned out to be a great experience for our consultants – and valuable learnings for our organization. Our consultants learned about the different types of coaching support provided by other consultants, as well as how our *performance* coaching differed from personal effectiveness coaching, professional development coaching, etc. As a consultant, you will need to remain open to this type of continuous learning, because the field of OBM does not have it all figured out!

We offer below a dozen skills that we have found to be essential to successful behavioral consulting. They constitute an “abbreviated assessment framework” that we used for hiring and developing our own very best behavioral consultants. Ask yourself how you would rate your own capability on each skill.

- (1) *Takes Action to Monitor What is Happening in Business and What Else is out There*
 - (a) Remains up-to-date with business trends, issues, and contemporary thought pieces through reading and participation in associations and workshops.
 - (b) Expands knowledge base in disciplines and business models through reading and participation in various activities.
 - (c) Monitors what others are publishing or discussing in our field.
- (2) *Actively Engages in Relationships for Client Development*
 - (a) Regularly spends time connecting with existing clients and contacts to share value-adding pieces like articles, insights, connections.
 - (b) Expands relationship base and network within existing clients when onsite or following meetings.
 - (c) Solicits feedback at appropriate intervals or milestones from key client contacts.

- (d) Establishes credibility and client confidence through proactive inquiry and understanding of the clients' businesses and challenges, then linking these with company offers and capabilities.
- (3) *Seeks and Acts on Opportunities to Develop Business with Clients and Relationships*
 - (a) Identifies and acts on opportunities within existing clients to continue or expand scope of work and ways in which our firm can add value to the client.
 - (b) Seeks and develops opportunities with prospects to introduce behavioral solutions that would be helpful to them, based on consultant's knowledge, observations, research.
- (4) *Helps Colleagues get Better – And Actively Seeks Feedback for Self-improvement*
 - (a) Provides real-time positive and constructive feedback to colleagues to help them improve their skills and expand their knowledge base.
 - (b) Actively seeks to reinforce the contributions of clients and colleagues.
 - (c) Solicits and accepts real-time feedback from clients and colleagues to improve self.
- (5) *Collaborates well with Colleagues as Part of a Broader Team*
 - (a) Proactively shares information, models, and knowledge with others on the project team as well as more broadly within the company.
 - (b) Meets commitments to the team and offers to help others meet their commitments, thereby contributing to the team's success.
 - (c) Acts in the best interest of the team, even when it means subordinating personal interests.
 - (d) Proactively shares client-related information and issues with colleagues, unless it contains confidential information that must be kept private (e.g., succession) or personal information that was shared in confidence (e.g., divorce).
- (6) *Ensures Excellence in Consulting Delivery*
 - (a) Meets commitments to the client and to colleagues, and generally over-delivers.
 - (b) Exercises discipline and organization in scheduling and executing work.
 - (c) Establishes and adheres to the agreed-upon project/team plan and methodology.
 - (d) Carefully listens to client needs, and accordingly applies and adapts consulting models and tools in real time.
- (7) *Is an Outstanding Communicator*
 - (a) Produces written documents such as proposals, reports, and articles that are succinct, clear, well-organized, and grammatical.

- (b) Prepares presentations for internal and client audiences that are clear, well-organized, well-sequenced, applicable to the intended audience, and deliver the intended message.
 - (c) Presents material and content in a clear, succinct, well-paced manner.
 - (d) Listens for understanding and adapts messages in real time to deliver the intended content.
 - (e) Listens to others' contributions and position on issues and reflects on others' input to assure understanding
- (8) *Offers to Facilitate Conversations that Help Client and the Team*
- (a) Initiates internal and client meetings:
 - > Establishes and communicates meeting objectives.
 - > Encourages appropriate levels of participation.
 - > Maintains meeting focus on specific agenda items.
 - > Brings discussions and topics to timely closure and summarizes conclusions and actions.
 - (b) In discussions, shares information and states own position, and solicits feedback and others' contributions, and builds on them.
 - (c) Engages and draws others into discussions to assure balanced participation through questioning and reinforcement.
- (9) *Ensures Measurable Results are Achieved*
- (a) Defines metrics and levels of performance achievement with milestones, behaviors, and business outcomes.
 - (b) Establishes tracking, reporting, and feedback mechanisms for the project team and for the client, consistent with agreed-upon metrics and targets.
 - (c) Tracks and reports on project and client metrics and offers suggestions and adjustments in project delivery.
- (10) *Actively and Accurately utilizes Applied Behavior Analysis*
- (a) Draws upon ABA principles and applies them real-time in the client business setting.
- (11) *Demonstrates Business Acumen*
- (a) Consistently and correctly applies general business principles real-time to help client integrate them with application of behavioral science.
- (12) *Maintains Visibility and Presence in Target Market and in the OBM Community*

- (a) Projects executive and professional presence through physical demeanor, including posture, grammar, clarity of thought and speech, tone of voice, dress, etc.
- (b) Publishes, speaks, and maintains an active presence through LinkedIn and other media, showcasing successful projects and thought leadership.

While at CLG, we developed a competency model for behavioral consultants - please see [Appendix A](#).

Lesson #7: Care. Really care. Show you care.

The bottom line to successful consulting comes down to six words: *Care. Really Care. Show You Care*. If you do those six words well and consistently, you will have a lifetime of success and more clients than you could possibly serve.

These six words were the backbone of our own careers – and remain so today. They demonstrate what makes good consultants great – and great consultants even better. They lead to clients seeing you as a partner versus a vendor. They lead clients to trust and confide in you.

They make your life and relationships rich. They were our secret sauce when we worked together at CLG, and they remain our secret sauce in our respective companies today.

Care

If you *CARE* about your clients, you will always be on time for calls and meetings. You will be well-prepared because you have thought at length about them prior to the meeting and about what they might be interested in. You will be ready to focus on what matters to them. You exist to help them, not to sell them something. You will take detailed notes so you can recall specifics of your conversation – and can more reliably embed their terminology into your methodology – and begin speaking their language. *You care*.

Really care

If you *REALLY CARE*, you will reach out prior to the meeting and ask if there is anything you can read or study to familiarize yourself with the issue that they want your help to solve. You will read their Investor Relations postings for the past month, study the organizational structure of the company, and have a sense of what they are trying to drive within their culture and as a company.

If you REALLY CARE, you will ask many questions during the meeting – so you fully understand what they are trying to do, what they have tried that has failed, what their constraints are (budget, timing, role they want you or others to play), and what their concerns are about the topic. If you REALLY CARE, you create a safe zone with your relationship, so they confide in you and trust you to say things that are confidential, unflattering, but highly relevant. Trust takes time to build, and you do not rush. *You really care.*

Show you care

If you *SHOW YOU CARE*, you bring solutions and methodologies that are customized for them, based on what you heard. If they are trying to drive diversity or customer-centric behaviors, but want you to help with leadership development, you integrate actively encouraging diversity – and driving customer-centric behaviors – into your proposed methodology for leadership development.

Why? Because that is what the client needs and wants – even if it makes your part of the work harder. If you want to *SHOW YOU CARE*, you identify parts of your “consulting solution” that are optional if they need to reduce your fees. You are willing to reorder or delay things that allow them to move forward. *SHOWING YOU CARE* means putting the client first in every way. You show you care.

Caring for the clients. Really caring for them . . . and showing that you care for them – is how we got to be one of the most successful behavioral consulting firms in the world. We out-cared our competitors – in addition to bringing consulting solutions rooted in Applied Behavior Analysis. That combination was impossible to beat.

Looking forward

For almost thirty years, we have worked alongside our clients around the world to create happier, high-performing workplaces using the science of behavior analysis. We have been honored to work at all levels of global companies on a wide range of performance, from improving very complex behaviors at the executive level (e.g., consistently making high-quality decisions about how to spend millions or billions of dollars) to ensuring safe and productive operations across thousands of frontline employees every day. While we have not always passed our OBM colleagues’ “purity test” in how we applied the science, we have always helped clients understand that unwanted behavior variability can be a root cause of poor performance organizationally – and what to do about it.

We hope that our Lessons Learned will help you apply important learnings to your OBM marketing and consulting endeavors. Try the worksheets in [Appendix B](#) to begin organizing your thinking. Reach out to other OBM practitioners, to talk through what you are considering. Do not be afraid. You will find that OBM practitioners are naturally outgoing and want to be helpful.

Everyone in OBM is a pioneer in one way or another. We are all continuously learning and getting better at communicating about and applying our science in ways that allow us to have an even bigger impact. Doing that – and actively caring for your clients – will create no end of possibilities for how you can help them – and make the world a better place.

Disclosure statement

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Appendices

Appendix A Behavioral Consultant Competency Model – Personal Attributes

While at CLG, we developed a competency model for behavioral consultants – to guide our own firm and our clients who were committed to implementing behavioral science and wanted to deepen the consulting capabilities within their own organizations. We have shared this framework with Western Michigan University’s OBM faculty – and wanted to ensure its availability to all those desiring to teach or practice consulting using Applied Behavior Analysis.

– Leslie & Julie

Cognitive Abilities and Thinking Style

- (1) General Cognitive Ability/Aptitude: the ability to quickly learn and apply new information and skills and solve problems effectively.
- (2) Analytical Skills: the ability to apply logic to identify patterns and trends in quantitative and qualitative data.
 - (a) Anticipates/articulates probable future events and behaviors, based on observation of current events.
 - (b) Sees the relationship among and integrates apparently disparate pieces of information; draws conclusions from and formulates next steps from this information.
 - (c) Discusses information and issues on both granular and conceptual levels.
- (3) Systems Thinking: the ability to see the big picture by critically analyzing complex situations, probing issues in-depth, and choosing solutions that maximize long-term results.

Interpersonal Style

- (1) Emotional Intelligence: Demonstrates interpersonal insight and self-awareness and uses this understanding to respond appropriately to different situations and people. Effectively manages the emotions of self and others. Integrates feelings with logic to make effective decisions.
- (2) Insight: Sees beyond an individual’s external behavior to the beliefs, assumptions, and motivations contributing to their behavior. Seeks data from others to challenge own position and reshape it as appropriate. Understands and anticipates impact of own behavior on others.
- (3) Humility: Understands and discloses own knowledge and skill gaps and can learn from the experience and contribution of others. Is aware of and open about own strengths and weaknesses. Welcomes/solicits and uses feedback from others.

Working Style

- (1) Achievement Orientation: possesses a strong internal drive and motivation to succeed and excel. Holds self to high standards and is dissatisfied with average performance.
- (2) Resiliency: demonstrates optimism and fortitude when faced with obstacles and challenges. Quickly adapts to changes and accepts ambiguity. Self-regulated in order to maintain energy reserve and displays endurance over time.
- (3) Energy: achieves and sustains high levels of mental (and physical) activity and remains alert, logical, and sharp for extended periods.
- (4) Integrity: demonstrates strong personal ethics that are compatible with the company’s values and evidenced by speaking candidly, following through on commitments, demonstrating respect for individuals and groups, and abiding by honorable business practices.
- (5) Visibility & presence: projects executive presence through physical demeanor, including posture, grammar, clarity of thought and speech, tone of voice, dress, etc.

- (6) Health & well-being: engages in activities, such as diet, exercise, and rest that will sustain and enhance own health and well-being.
- (7) Dialogue: advocates own point of view and welcomes/solicits feedback. Is sincerely interested in others' opinions. Sees merit in others' ideas and builds upon them.

Appendix B Lessons Learned Worksheets

Lesson #1: Match your market with your personal passions and ability to get results.

What market am I passionate about improving?

What relevant experience do I have in this market?

What results can I help improve for clients in this market by using OBM, and why do I believe that? What results have I personally produced? What results from others can I reference?

Lesson #2: Reframe Behavior Analysis in a way that resonates with your target market.

Which behavior science terms, concepts, and methods will my market accept?

Which behavior science terms, concepts, and methods will I need to change or simplify?

What lessons did I learn by reviewing the websites and books of other behavior scientists and competitors?

Who in the market will provide me with feedback on my marketing “pitch?” (list more than 5 people!)

Lesson #3: Differentiate your OBM products and services from the competition.

Who are my competitors, both within OBM and outside our field?

Considering the seven features of a behavioral intervention (see Core Differentiating Features of OBM), which ones can I use to differentiate my services?

Lesson #4: OBM consultants are hired to help change behavior; antecedents alone are insufficient.

What new behaviors need to be shaped as part of my engagement?

What antecedents/consequences are available to help shape new behaviors?

Who are other consequence providers that I need to engage in this process – to ensure new/fragile behaviors are encouraged in the workplace when they happen?

Lesson #5: Always approach your consulting engagements with a perspective that is Outside→In.

How would my client describe the problem?

How does my proposed intervention lead to improvement? What leading and lagging indicators can I track to know if progress is being made?

What review cycle and metrics will I use with my client to review if behaviors and outcomes are changing/improving?

Lesson #6: Turbocharge your OBM expertise with top-notch consulting skills.

What did you learn about this client in your pre-meeting, and how you can help?

Who (else) should you connect with (in the organization) to ensure buy-in for what you have proposed?

What modifications would make your program even stronger, given everything you have learned about these clients/the company?

Lesson #7: Care. Really care. Show you care.

What have you done that would signal to the client that you CARE?

What have you done that would signal to the client that you REALLY CARE?

What have you done that would signal to the client that SHOWS YOU CARE?