

## Helping Clients Get Top Results

**Waterloo firm's training programs are custom-made for specific needs**

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The Waterloo firm ShaughnessyHowell Inc. usually starts with "a blank note pad" in developing employee training programs for corporations such as Microsoft Canada, the Bay and Canada Post.

Only about 30 per cent of the business done by Cathy Shaughnessy and her business partner, Marion Thomson Howell, involves what the two would call "off-the-rack workshops."

Such programs, while tweaked to suit the needs of individual clients, are essentially of the generic variety -- on topics such as customer service, communications skills, leadership and team building.

That was the focus when the women established their company 14 years ago. But the emphasis has changed in the last seven years.

These days, most of the firm's business entails starting from scratch to develop programs that are geared specifically to client needs. The pair call these "made-to-measure" programs. They involve a lot of listening, research and analysis. "Mostly what we do now is help people implement their own strategies," Shaughnessy says. Some training consultants "go to the table with answers. We come to the table with questions."

The women try to avoid pre-conceived notions before developing a program and, Shaughnessy says, "we always start out with a direction-setting meeting" to clearly define the goal of the exercise.

### Define the Goal

That's usually followed by research and talking to managers and employees of clients to get their ideas and suggestions.

The Bay, for example, says Shaughnessy, wanted its beauty advisers to be more effective at serving customers and more efficient at selling products.

"So we developed a team where we worked with their beauty advisers and their managers and anybody who was a key stakeholder."

Her firm also hired 10 "mystery shoppers," who were given \$50 each "to go out and shop at the cosmetics counters and come back and tell us what their experience was. We wanted to see from a customer's experience how they were being treated."

In the end, ShaughnessyHowell developed a CD-ROM, a video and a workshop.

"The program was called Building Your Business at the Bay," Shaughnessy says.

The idea was to encourage sales people "to take responsibility as though they were running a business and not just staffing a retail counter."

For example, they were urged to ask customers if they would like to receive promotional mailings on cosmetics and, if so, to get permission to enter their name and address into a database.

In 2001, ShaughnessyHowell won an Otter Award from the Ontario Society for Training Development ([www.ostd.ca](http://www.ostd.ca)) for that project,



Cathy Shaughnessy (left) and Marion Thomson Howell own and operate ShaughnessyHowell Inc., a Waterloo training company they launched in 1989. They now have seven employees.

Photo by MATHEW MCCARTHY, RECORD STAFF

judged the year's best internal training program.

It won three other society awards for programs it created for Canada Post.

"They have an ability to get inside our business," Marnie Armstrong, a manager with the Crown corporation, said in an interview.

"They'll go to our postal outlets and field management teams and actually work with our own people. That gives them a really good understanding of how our business operates and puts them in a better position to meet our needs."

Another client was MCAP Financial Corp. in Kitchener.

It wanted help in training its call centre personnel, who were mostly young people needing more in-depth knowledge of the business. ShaughnessyHowell put together a training manual on mortgage basics.

"We did very traditional research for those programs and we had to distil it into very common language. We went to financial textbooks and Web sites and researched through libraries," Shaughnessy says.

The firm also relied on the expertise of senior company executives, although they were not expected to actually write the training manual.

## Second Nature

"It's that whole philosophy of not being able to see the forest for the trees," she says. "The knowledge is so second nature to them that it takes somebody from the outside to say 'this doesn't make sense to me.'"

Another aspect of the "made-to-measure" programs is that the client gets to own them.

"Our name will not appear (on the training material)," says Howell. "We give them the files, the production information. We do it all, so they now own their own training material."

She goes on to explain: "They provide the content. We couldn't own that. We just package it for them."

Elections Ontario, for one, owns a program, including a video and workshops, developed by ShaughnessyHowell last year to train its staff on election procedures.

The firm is developing another program this year for its federal counterpart, Elections Canada.

ShaughnessyHowell also spends most of its time developing or "designing" training programs and less on the actual delivery.

It usually conducts the first session or presentation, but then the client takes over.

For instance, it designed a customer service program for Manulife Financial and "their people are delivering it," Howell says.

"That's a common part of our model. We do the presentation for the first time and then we train the trainers and they roll it out across the country."

In other cases, the delivery is handled by a combination of people, depending on a variety of circumstances.

Howell says: "We still do some delivery as well. But we have a number of subcontractors across the country and often they will do the delivery for us."

In addition to Shaughnessy and Howell, the firm has two trainers on staff who conduct sessions.

The company gets most of its work through networking, word-of-mouth, through its Web site ([www.shaughnessyhowell.com](http://www.shaughnessyhowell.com)) and by bidding on government contracts.

It also monitors the MERX Web site ([www.merx.com](http://www.merx.com)), which lists requests for proposals from the public sector.

"We respond with either a two-page summary or as much as an 80-page proposal," Shaughnessy says.

Referring to the lengthier, time-consuming proposals, she says: "That's the cost of doing business. But we don't do that every day. We've probably done it five or six times in the last four months."

Shaughnessy, 43, has a degree in psychology from Wilfrid Laurier University in Waterloo.

After graduating, she sold real estate and for a time managed a bar. But then she landed a job with a management consulting firm, Creative Organizational Design in Waterloo, where she worked for about six years.

Later she became a trainer for CareerTrack, Colorado-based firm.

Howell, 50, is a graduate of the University of Toronto and University of Western Ontario with degrees in physical and health education.

She initially was a lecturer on health studies at the University of Windsor, then served as a project manager in health services at the University of Waterloo. Her career path intersected with Shaughnessy when she, too, joined CareerTrack.

## Started In 1989

The women combined their experience when they started their own firm in 1989.

"In the early years, our largest contract would have been \$1,500. Now, it is not uncommon for our contracts to be \$150,000," Shaughnessy says.

Three years ago, the firm passed a milestone when it brought in annual revenues of over \$1 million.

Sales have slowly increased since then. "We're definitely holding our own," Shaughnessy says.

For the first eight years, the staff, in addition to Shaughnessy and Howell, included a secretary and a sales person.

It has since grown to seven employees, including Kate Johnston, who handles business development, sales and marketing, and operations director Valerie Braid, who is in charge of three administrative support staff. There are also two trainers, who report directly to Shaughnessy and Howell.

Graphics, video production and similar tasks are sometimes contracted out to local companies.

In June last year, the firm moved from an office in the north end of Waterloo to a renovated, two-storey historic house it leases at 156 King St. S., in the area opposite Brick Brewery.

The partners invested about \$50,000 on leasehold improvements, furniture and equipment.

While the entire staff is female, that's not by design, Howell says.

"You know what? They were the right people. We had a fellow working with us and when he left, the best candidate happened to be a woman. They're a phenomenal team. I wouldn't trade one of them."