The Instructional Development Specialist as Consultant

Barry Bratton
Assistant Professor
Division of Instructional Design and Technology
College of Education
and
Director
Learning Resources Unit
College of Medicine
The University of Iowa
Iowa City, Iowa 52242

Abstract: Successful instructional developers, as well as their clients and employers, are coming to realize that in addition to conceptual and technical ID skills, appropriate interpersonal "people" skills to cultivate an on-going collaborative relationship with the client are required for development efforts to succeed. This article views developer-client interaction from the perspective of the consultation process. It reviews the current level of knowledge about consulting skills as it applies to ID, summarizing and relating six theory- and research-based and six practical, intuition-based conceptions of the consulting process itself; consulting styles; client styles; necessary consulting skills; and training approaches for consulting skills. The article concludes with an analysis of four areas in which more inquiry regarding the ID consulting process is needed.

In a recent *JID* article, Durzo, Diamond, and Doughty (1979) suggested four major areas of inquiry for the instructional development field:

- Organization and administration of instructional development programs;
- Instructional development process and developer-client interactions;
- Instructional design process; and
- Evaluation.

The authors pointed out that while all four areas have not received equal attention by researchers, each is supported by scholarly inquiry in a number of subordinate and related areas. For example, Figure 1, taken from the Durzo et al. (1979) article, shows the major heading of "Instructional Development Process and Developer-Client Interaction" with its supporting areas of inquiry. Included among the supporting areas are consulting skills and techniques.

The purpose of this article is to examine the current level of knowledge about consultation *as it applies in the instructional development context.* This will be accomplished by reviewing the published literature and professional presentations focusing on instructional development consultation. The article closes with some observations on the status of inquiry in this area including suggestions for further investigation.

Overview

As the knowledge base and interest in instructional development (ID) continues to grow and mature and as the instructional development specialist (IDS) becomes increasingly accepted by the education and training communities, there is the recognition that the practicing IDS must possess many skills. Experienced, successful instructional developers, as well as their clients and employers, are realizing that a knowledge of the ID process and the possession of conceptual and technical skills are insufficient for the effective practice of instructional development; possession of the appropriate interpersonal "people skills" to facilitate the development and maintenance of a successful collaborative relationship with the subject-matter expert (SME) — teacher or trainer—is also required (Silber, Note 1; Rose & Riegert, Note 2; Rutt, Note 3).

Davies (1975) warned of the consequences if the human relationship aspect of ID is ignored:

> Instructional development and evaluation in a vacuum would be fairly simple and mundane processes. Fortunately, development and evaluation only make sense in the context of people, and yet—in an almost desperate attempt to realize the task—we sometimes tend to ignore the relationship side of the instructional situation. No matter how pert our development and evaluation procedures, no matter how sophisticated and scientifically based our techniques, little will be achieved if the quality of human relationships is overlooked or ignored. A project that is task oriented, without being also relationship oriented, thereby increases the probability of its own rejection. (p. 372)

For purposes of this article, the generic term "consultation" will be used to denote the relationship established between the IDS and an SME. Colton (1974), Rutt (Note 4) and Leitzman, Walter, Earle, and Myers (Note 5) refer to it as a "helping relationship."

Lippitt (1959) offers a definition of consultation which, when translated into the context of instructional development, pictures the IDS as a professional helper (the consultant) who provides assistance to a help-needing system (the SME client) about instructional problems. Both the IDS and SME see the relationship as voluntary (at least psychologically) and temporary; neither views the IDS as a part of the SME's professional field even though the IDS is employed by the client system or larger suprasystem. The SME client, according to this definition, may be one individual, a group of persons, or an entire department or school. The IDS is an internal consultant as opposed to an external agent hired temporarily for an honorarium from outside the institution.

Over the past several years there has been a growing interest in the instruc-

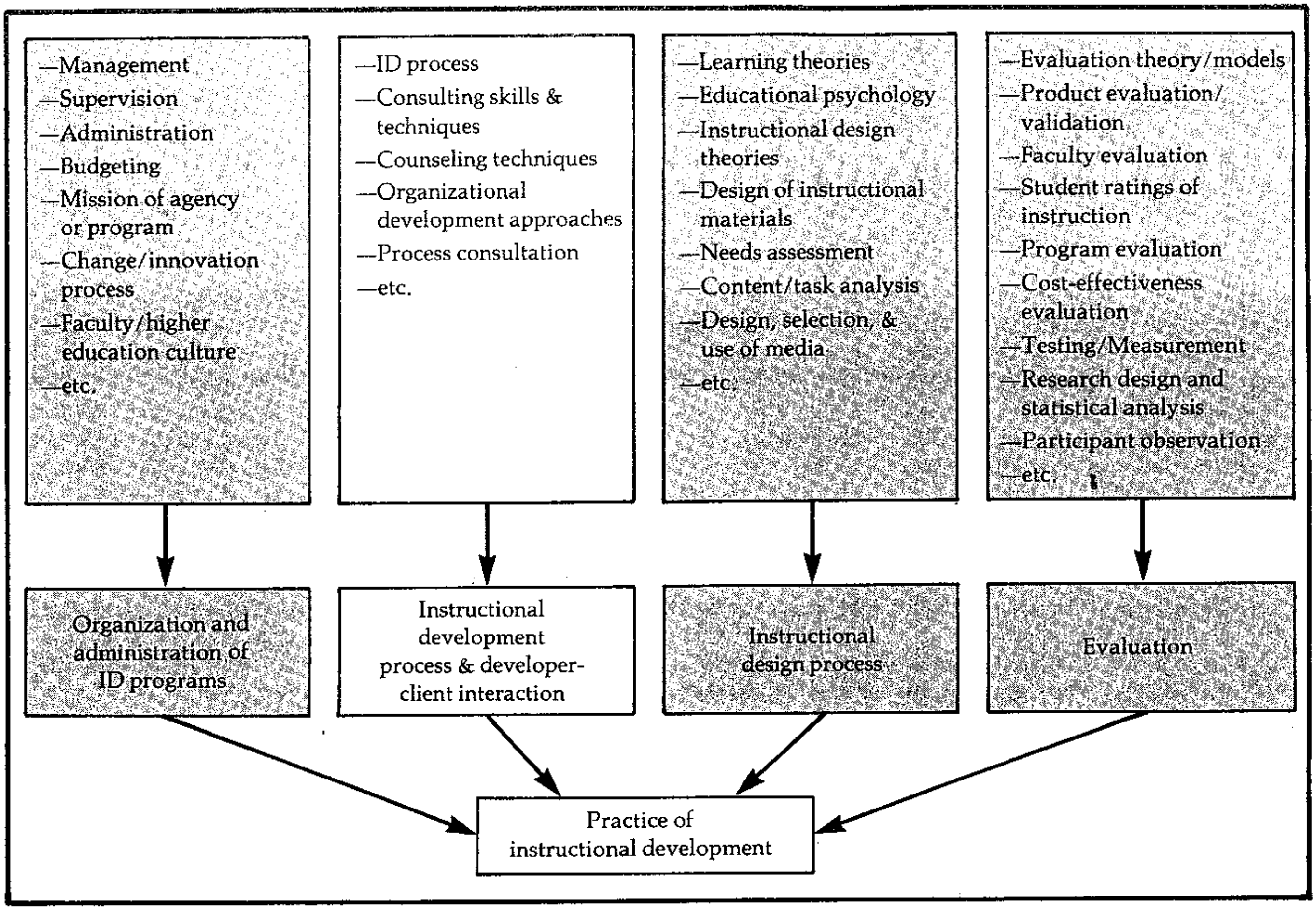

FIGURE 1. Scope of the knowledge base for the activities of instructional development in higher education. (From "An analysis of research needs in instructional development" by Joseph J. Durzo, Robert M. Diamond, and Philip L. Doughty, *Journal of Instructional Development*, 1979, *2*(4), 4-11.) Shading was added for use in this article.

tional development field about the consultation process described above. This interest is reflected in the following review of pertinent publications and professional presentations.

Review of Theory and Research

Six publications that discuss ID consultation in terms of either documented theory or research data will be reviewed.

The most extensive theoretical discussion of the IDS-SME relationship to date was prepared by Davies (1975). He examined the relationship between instructional developers/evaluators and clients in the context of a theory of advice. Davies argued that the fundamental role of the developer/evaluator is giving advice to clients and allowing them to make the final decisions. He discussed the relationship in terms of three models. In the *product model*, the client is a customer who provides the developer/evaluator with an explanation of what is needed and leaves it to him or her to create the solution. The interaction between the developer/evaluator and client is minimal: It is assumed that the client understands the problem well enough to request the proper solution and the responsibility for preparing the desired solution lies with the developer/evaluator. In the *prescription model*, the relationship of the developer/evaluator and client is analogous to that of the physician and patient. The emphasis is less on a product and more on maintaining a "healthy" instructional state through periodic developer/evaluator-client contact. The *product-process model* employs elements of both of these models but views the relationship as "a system of decisions, reached by agreement, concerning what is expected in terms of both the results to be achieved and the changing roles (of the parties involved) to be exercised as advice is given and accepted. The relationship is essentially a dynamic one, as compared with the static relationship assumed in the previous models, continuously changing until a final termination is achieved" (p. 359).

Davies postulated six results which can be achieved as a consequence of a positive product-process relationship: improved student performance, improved allocation of resources, improved client skills in ID and evaluation, improved client-developer/evaluator relationships, improved relationships within the client system, and improved developer/evaluator skills.

The bulk of Davies' paper is a discussion of the relationship activities which parallel ID task activities, Grouped under three broad headings, the relationship activities include *entering, maintaining*, and *terminating* an IDS-SME relationship. Entering into a relationship includes initial contacts with a client and the negotiation of a formal and psychological contract. Maintaining a relationship consists of three phases: diagnosing the client's real or perceived needs, offering alternative courses of action to the client, and implementing a chosen course of action. The terminating stage consists of a review and evaluation of the relationship with eventual reduced involvement or complete termination. The article contains no research evidence, descriptive studies, or self-reports in support of these theories.

Coscarelli and Stonewater (Note 6) advance the theoretical argument that if the SME's decision-making style can be identified, the success of the IDS-SME relationship will be improved. Drawing on a theory of decision-making types in therapeutic settings, the authors asserted that the SME's decision-making style can be charted on a two-dimensional matrix: information-gathering style (systematic or spontaneous) and data analysis style (internal or external). They presented four hypothetical examples of verbal IDS-SME interactions to typify each type. The theory awaits empirical investigation.

Rosenberg (1978) drew upon rerearch on supervisor-teacher conferencing to explore strategies for improving the IDS-client interaction. He suggested that, like supervisors during teacher conferences, instructional developers may use verbal behaviors which are judgmental and discourage client participation or they may employ behaviors which indicate concern and invite client involvement. Rosenberg proposed that the developer-client relationship should be studied by analyzing the verbal interactions. A system for coding the interactions was offered; the system included various categories for IDS talk and client talk. (See Figure 2.)

Price (Note 7) conducted an exploratory study of the verbal behaviors of six practicing instructional developers during their first meeting with new SME clients. The interviews were recorded on audiotape and coded by independent judges according to a classification system developed by Price. The system consisted of four phases (introduction, problem identification, solution discussion, closing), six content categories (subject-matter, objectives, teaching methods, media, evaluation, other), and twelve process categories (reinforcing, soliciting, prompting, explaining, opining, clarifying, informalizing, structuring, summarizing, declaring, dispensing, other).

The results of the study showed several commonalities of developer behaviors regardless of the client or the client's problem: The largest percentage of time was spent in the solution discussion phase; the content of the discussion most frequently centered on instructional methods; and the process behaviors consisted mostly of explaining, offering opinions, and reinforcing the client.

Rutt (Note 4) investigated the consultation styles of IDS practitioners based on an Instructional Development Consultation Styles Inventory. The written inventory, developed by Rutt, contained a series of scenarios of IDS-SME verbal encounters, and subjects were asked to choose one of several alternative responses provided by the experimenter. Each response represented one of four theoretical consultation models gleaned from the literature. Data were collected via a mailing to IDS practitioners in higher education institutions in the United States. The major finding of the study was that the practitioners do not adhere to one particular consulting model regardless of the phase of the relationship (entry, analysis/diagnosis, or problem-solution), the innovation discussed (instructional strategy changes or media usage), or the system level (curriculum, course, or unit).

Savage (1975) designed and evaluated an experimental training system to improve the empathic capabilities of the IDS when interviewing an SME client. Participants in the experiment, students enrolled in the instructional development curriculum at a major university, were subjected to a three-phase treatment adapted from a training program for personnel counselors. The dependent variables were pretest and posttest scores on an affective sensitivity scale (ability to assess the affective state of

MEDIA SPECIALIST TALK	INDIRECT BEHAVIOR	1. BUILDS CLIMATE (releases tension)
		2. PRAISES OR ENCOURAGES (positive value judgments)
		3. ACCEPTS AND USES CLIENT'S IDEAS (elaborates on client's suggestions)
		4. ASKS FOR INFORMATION (seeks facts
		5. ASKS FOR OPINIONS AND SUGGESTIONS (seeks input from client)
	DIRECT BEHAVIOR	6. GIVES INFORMATION (states or explains)
		7. GIVES OPINIONS OR SUGGESTIONS (expresses personal views)
		8. CRITICISM (negative value judgments)
CLIENT TALK		9. ASKS FOR INFORMATION (seeks facts)
		10. GIVES INFORMATION, OPINIONS, OR SUGGESTIONS (response to Specialist or self-initiated)
		11. BUILDS POSITIVE CLIMATE (releases tension)
		12. BUILDS NEGATIVE CLIMATE (criticism, hostility, disagreement, forced compliance, defensiveness)

FIGURE 2. A system for analyzing media specialist-client interaction. (Adopted from Blumberg, 1974, and Flanders, 1970. From "Media specialists and their clients: Strategies for effective interpersonal communication" by M. Rosenberg, *Educational Technology*, 1978 *18*(2), 50. Copyright 1978. Reprinted by permission.)

others) and a coorientational measure (ability to predict the belief system of another).

In the first treatment phase, subjects viewed a videotaped lecture-demonstration to improve their skills as interviewers and to learn to discriminate among different types of interviewer responses. Then the subjects watched a second videotape containing counseling session vignettes and were asked to properly label the observed interviewers' responses. Feedback was provided to tell the subjects how accurate their discriminations were. In the second phase, each subject was videotaped as he or she watched experimenter-produced film vignettes depicting typical IDS-SME encounters. The videotape was shown to the subject with a trained counselor present to help the subject recall his or her reactions to the filmed vignettes. The final training segment consisted of dyadic role plays in which the subjects were assigned to either an IDS or SME role. Subjects designated as clients were coached to display a particular affect during the simulated interview; the affect was not made known to the "IDS." The subjects then reversed roles and the process was repeated. The simulated interviews were videotaped and replayed to each "IDS" as a trained counselor helped the subject recall his or her feelings and responses to the "client."

Savage reported a significant positive effect was achieved on the sensitivity scales while no difference was noted on the coorientational measure. He concluded that the training system was useful for increasing the empathic identification of instructional developers toward clients and that such training should be incorporated into the curriculum for preparing new instructional developers.

Review of Supporting Literature

Six publications are briefly reviewed which, though the conclusions lack a theoretical or research framework, serve to demonstrate the interest among practitioners in the client relationship.

Thiagarajan (1973) informally described his personal experiences with subject-matter experts and observed, "The SME has a different priority, a different loyalty and even a different language, and even our own side has accused us of 'speaking funny' at times. Neither person's role is clearly defined in most instructional development projects" (p. 2).

Colton (1974) identified ID as a helping profession and listed a series of "protocol rules" he felt would help developers establish good working relationships with clients. His first rule was to make certain that the roles of the IDS and teacher are clearly defined. He insisted that it is the developer's responsibility to explain the "jointness" of the enterprise and to build an atmosphere of trust.

> ". . . a knowledge of the ID process and the possession of conceptual skills are insufficient for the effective practice of instructional development. . ."

Silber (Note 1) has provided the most detailed analysis to date of the specific interaction behaviors recommended for an IDS. He identified 22 "people skills" the IDS might use over the course of his or her relationship with an SME. These skills are presented in Table 1. Silber emphasized that his list was not exhaustive; that not all the skills would be called for in every ID project; that the skills may not occur in the sequence he presented them; and that the nature of the interaction, the situational context, and the individuality of the IDS would determine how and to what extent the skills would be used.

Rose and Riegert (Note 2), using a case study approach, described a developer's interaction skills from the client's perspective. Citing their first experience as SMEs in an ID project, they identified three roles played by the IDS:

1. *Salesman*—He (a male) convinced the clients they could do the job, showed them the results of other projects, reinforced their level of expertise and ideas, and showed them how to begin.

2. *Facilitator* — He asked questions, provided information, described the overall plan, allowed them to make the decisions, and provided support services such as typing and library research.

3. *Counselor*—He projected a caring attitude; listened, evaluated, and analyzed their ideas and gave immediate feedback; and provided pleasant comfortable physical work surroundings.

Osterman (Note 8) offered techniques for the IDS to ascertain the scope of a proposed ID project. One determiner of the scope is information about the client. The author felt the IDS must get information about the client's personality, motivations for seeking consultation, level of commitment to engage in ID, and his or her view of the role of the teacher. Osterman believed the IDS must be skilled in consultative interviewing to learn such information. He provided a model for working with different types of clients, including a checklist for evaluating the initial IDS-SME conference. He also included a very slightly modified list of Silber's interaction skills.

Deden-Parker (1979) focused on the skills necessary for the IDS to practice effectively in business/industry settings. Drawing from the counseling profession, the author said that during the initial conference the IDS must hold back his or her personal ego-concerns and give full attention to the client in a visible way. The techniques include positive body language, questioning and paraphrasing the client, initiating potential alternative courses of action, and reinforcing the client's contributions.

> ". . . our present knowledge of the area can best be described as a mile wide and an inch deep."

Each of the six articles reflects intuitions and opinions based on practical ID experiences. As such, they contain a certain face validity. The ideas contained in them provide a fertile field for empirical investigations.

Observations and Suggestions for Inquiry

The preceding review represents an exhaustive examination of the literature in ID consultation. There is little doubt that the topic has become increasingly important to the ID field in the last 5 years. At the same time, our present knowledge of the area can best be described as a mile wide and an inch deep. Much of the writing falls in the categories of personal opinions and how-to-do-it approaches. Each writer has selected an area of personal interest and explored it. (Interestingly, no author thus far has published or presented further work on the topic; this may change in the future.) The efforts to date do provide, however, stimuli for inquiry:

1. *What does occur behind the office doors when developers and clients interact?* Price (Note 7) demonstrated that the verbal interactions can be captured and analyzed; Rosenberg (1978) suggested an alternative method of systematically codifying IDS-SME verbal interactions. Descriptive studies of both verbal and nonverbal interactions are needed as well as validated instruments and procedures for gathering such data. Can trained observers be placed within the IDS-SME meeting without influencing the interaction? Can audio and video recordings provide complete and accurate information? What behaviors do experienced ID professionals engage in when consulting with clients? Are there basic consulting skills regardless of the client, the setting, the phase of the relationship, the client problem?

2. *What constitutes a "good" IDS-SME relationship?* Philosophical treatises with accompanying suggestions for inquiry or verification would be insightful. What moral and ethical considerations, if any, surround the relationship? How do IDS practitioners who are successful at initiating and maintaining a client relationship define a good relationship? Leitzman et al. (Note 5) suggested that a formal contract negotiated between the developer and the client is one mechanism for starting and carrying on a good relationship. What does the literature from other "helping professions"—counseling, psychiatry, law, social work, theology, to name a few—contribute to our understanding of the IDS-SME relationship?

3. *What is the client's view?* Rose and Riegert (Note 2) showed that clients are aware of some IDS behaviors. What cues do they use to judge the relationship? How do they define a good relationship? Can client types be identified, per Coscarelli and Stonewater (Note 6),

TABLE 1. People functions/skills involved in working with content specialists to develop instructional systems. (From "Organizational and personnel management structures needed for the successful implementation of instructional development in educational institutions" by Kenneth H. Silber, unpublished manuscript, 1975, 23-28. Reprinted by permission.)

A. Establishing a Relationship
  1. Breaking the Ice
    a. Be pleasant and cordial.
    b. Be warm and open.
    c. Identify who you are and "where you are coming from."
    d. Draw out client—who is he or she?
  2. Setting the Tone
    a. Be task oriented but light-hearted as well.
    b. Be equal (not authority or servant)—both people have different things to contribute.
    c. Be open, with two-way praise and/or criticism possible.
    d. Make clear that your role is to help, not threaten, client.
  3. Communicating Nonverbally
    a. Keep tone of voice pleasant, calm, equal.
    b. Keep body language open and equal.
    c. Keep environment conducive to open and equal interchange.
  4. Identifying Expectations
    a. Why is client seeing you—what prompted client to come to you?
    b. What does client expect to be outcome of work together?
    c. What do others expect to be outcome of work together?
    d. What does client think you can do for or with him or her?
    e. What does client expect to do him- or herself?
    f. How much time is there to complete the project?
    g. How much time is the client willing to put in?
  5. Listening
    a. Listen carefully and accurately.
    b. Listen to both verbal and nonverbal (tone, body language) messages.
    c. Be able to repeat back exactly what client said.
    d. Be able to synthesize and interpret what client said.
    e. Do not interrupt client.
  6. Identifying Type of Client
    a. Identify client's attitude toward ID and you. Is it:
      1. cooperative or blocking?
      2. equal or superior?
      3. philosophically for or against?
      4. pragmatically for or against?
    b. Identify client's personality. Is it:
      1. open or defensive?
      2. smart or slow?
      3. traditionalist or empiricist?
      4. worker or sluffer-off?
    c. Begin to identify techniques to avoid and to use with client.
  7. Contracting
    a. Do it as soon as possible, but not so soon as to destroy relationship.
    b. Determine in the contract:
      1. what is to be done,
      2. by when, and
      3. by whom.
    c. Determine modes of accountability for all parties.
    d. Be clear that you both are expected to fulfill your part of the contract.

B. Gathering Data About the Problem
  1. Identifying Current State of System
    a. Identify what course or program is now:
      1. content,
      2. instructional techniques,
      3. role of instructor, and
      4. use of media.
    b. Identify where course or program is now:
      1. successful?
      2. students happy?
      3. instructor happy?
      4. problems?
    c. Avoid solutions at this point.

and matched with IDS consulting styles?

4. *How should IDS consultants be trained?* What skills are most important for ID students to master in order to interview clients effectively? Following the lead of Savage (1975), what are the best methods for teaching these skills? Price (Note 9) and Deden-Parker (1979), for example, suggest didactic teaching sessions, role playing, observation of model developer-client interactions, and supervised internship experiences. To what extent are courses/experiences in ID consultation being offered by graduate training programs? Who are qualified to teach such courses?

A Final Word

There is much to learn about the IDS-SME relationship. The questions raised here are not meant to be exhaustive; they are intended to prompt discussion and inquiry.

But a word of caution is in order. While the intricacies of the IDS-SME relationship may hold a fascination for some at the moment, it would be unfortunate if the topic were to become a passion of the field. As Durzo et al. (1979) have shown, there are many areas for inquiry in our field (see Figure 1). We must remain conscious of the fact that the interaction between the IDS and SME is only one means to the important end of improving instruction and training. Inquiry in all areas is necessary for the ID field's continued growth.

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3. Rutt, D. *An investigation of the consultation styles of instructional developers.* Paper presented at the Annual Convention of the Association

TABLE 1. People functions/skills involved in working with content specialists to develop instructional systems. (Continued)

2. Eliciting/Probing
   a. Ask questions.
   b. Start with general questions (e.g., "what are your goals for this course?").
   c. Do not accept incomplete or shallow responses.
   d. Ask more specific questions.
   e. Ask more difficult questions.
3. Generating Examples
   a. Get to concrete level.
   b. Have client generate examples to clarify answers to questions.
   c. Place yourself in role of student and act out how client would teach/evaluate you.
   d. Ask "would this be an example of X? ________________"

C. Working Toward a Solution
1. Training/Informing
   a. Explain how an approach you use might help solve the problem.
   b. Explain the approach in general.
   c. Use or draw simple charts or graphics to help.
   d. Elicit both cognitive and affective responses to approach.
   e. Suggest further resources for client to learn about approach.
   f. Use resources that model, as well as contain, content.
2. Brainstorming
   a. Use when stuck.
   b. Try to list all possible ways of solving problem—no evaluation.
   c. Place premium on number of alternatives generated.
   d. Then return and evaluate list.
3. Suggesting
   a. Instead of asking, begin to make suggestions related to difficult areas or problems.
   b. Make them tentatively (e.g., "what if we look at it this way . . . ").
   c. Do not feel threatened if suggestion is ignored or criticized.
   d. If suggestion is no good, then either:
      1. make a new suggestion,
      2. ask client to build on or suggest an alternative suggestion, or
      3. return to "eliciting/probing" to discover why suggestion was no good.
4. Redirecting Thinking
   a. Use if client either uses old approach/terminology or if client gets hopelessly enmeshed and tangled.
   b. Say "I think we're (emphasize we-ness of it) having this problem because we're doing X; but our new approach suggests that we should do Y first instead. Would it help if we tried that now?"
   c. If redirecting does not work at first, keep trying it.
5. Synthesizing
   a. Do periodically—this is a must.
   b. Give sense of where you are.
   c. Tie together all information gained from other functions up to this point.
   d. Put synthesis tentatively ("I think where we are now is . . . ") and check with client for agreement.
   e. If OK, go to C3.
   f. If not OK, follow same procedure as in C3d.
6. Decision-making
   a. Force decisions to be made (both content and method).
   b. Keep written record of decisions reached.
   c. Look at how a new decision affects or is affected by prior decisions.
   d. Try to discourage too much changing of decisions.

D. Challenging the Client
1. Challenging Intellectually
   a. You do not have to agree with all the client's content or method statements.
   b. Challenge those you disagree with selectively—pick major ones.
   c. Challenge in an academic manner—calm voice, have data to back your position.
   d. Know when to withdraw challenge:
      1. if belief is too deeply held to change,
      2. if it threatens whole project and relationship, or
      3. if you're at an impass.
   e. Lose some challenges purposely to admit you're human, too.

Table 1 is continued on page 8.

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TABLE 1. People functions/skills involved in working with content specialists to develop instructional systems. (Continued)

2. Persuading/Cajoling
   a. Use especially on method decisions.
   b. If client disagrees, and you see it as a must, try to change client's opinion.
   c. Present two-sided argument—i.e., the client's does have a valid point of view, so look at it as well as your own.
   d. Look at consequences of both ways of proceeding.
   e. Try to demonstrate that your way is:
      1. better,
      2. easier, or
      3. more fun, etc.
   f. Try compromise if necessary
   g. Try an empirical approach—"Let's do one part this way and one part the other way (NOT my way and yours) and see what happens."
   h. Try a give and take approach—"we did the last one one way, let's do this one another way."
   i. Beg if necessary
   j. Demand if you can.
3. Confronting—Personal or Contract
   a. Use if person breaks contract or tries to sabotage project (e.g., misses meetings, doesn't do assignments).
   b. Begin calmly.
   c. Present agreement and violations.
   d. Ask reasons for violations.
   e. Ask for recommitment to project and assignment.
   f. If rationality doesn't work, either
      1. try D2,
      2. argue emotionally, or
      3. threaten organizational retribution.
4. Empathizing/Consoling
   a. Use after confronting, challenging, training, or to help establish relationship.
   b. Put yourself in client's position.
   c. Side with client against others (usually administrators) or unreasonable rules/expectations.
   d. Tell client story of when you were in same position.
   e. Explain how client is really better off now.

E. Managing the Development
1. Assigning Work
   a. Use if work is to be done separately.
   b. Write them down.
   c. Split fairly evenly.
   d. Get client's commitment to do it.
   e. Spell out clearly what the assignments are.
   f. Spell out clearly when they are due.
   g. Spell out consequences of not having assignments done (cognitively—e.g., the project will be two weeks behind—rather than threateningly).
2. Critiquing Materials Together
   a. Be sure you both have something to be critiqued.
   b. Begin by telling client what is good with the work produced.
   c. Ask for rationales from client for things you think are incorrect.
   d. Try to raise criticisms as questions rather than blatant statements.
   e. Make all criticisms constructive—not just "this is wrong."
   f. Make suggestions of alternatives or of how it can be improved.
   g. Do NOT offer to redo it yourself.
   h. Offer to work with client on correcting it.
   i. Return to "training/informing" if necessary.

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*Also see articles by these authors in this issue of JID.