Process Fitness –
Process Improvement Lessons from
Personal Trainers

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Abstract

Many people have seen the "before" and "after" pictures of people who have successfully undertaken a rigorous fitness program. What you don't often see is the pictures of those who fail to make the changes--just as companies don't advertise their failed process improvement efforts.

One key to success is to involve a personal trainer (or process improvement coach) early in the transformation effort. Michael has gathered some lessons from some premier personal trainers that can be applied either to personal or organizational improvement efforts.

This paper explores some of the areas where personal training and process improvement coaching are analogous, and then expands on one of these areas – dealing with difficult clients.

Michael will pass on lessons about how a trainer might deal with the know-it-all alpha male, the overly content person, the client who always goes off track, and others. These lessons may save you from a client or team member who (wittingly or unwittingly) sabotages your best efforts.

This presentation is suitable for both gym rats as well as couch potatoes - as long as you have a desire to improve.

Biography

Michael has 30+ years experience in the computer industry, with interests spanning agile methods, architecture, metrics, process improvement, project management, quality management, software risk management, and teambuilding. Currently an independent consultant, Michael started out as a computer officer doing satellite communications in the US Air Force, and has worked for the Software Engineering Institute, Lucent Technologies (Bell Labs), and Computer Sciences Corporation.

Michael is on the PNSQC Board, and has served as the Invited Speaker and Keynote Chair for the 2011 and 2012 conferences

He recently embarked on a Personal Training certification program, and noticed many similarities between what personal trainers and process coaches do.
1. Introduction

One day, standing in front of the mirror, you see someone staring back at you who doesn’t quite look like the person you remember staring back at you a few years ago. Possibly the paunch is a bit paunchier, the posture not as upright, and the arms not quite as firm. But there it is, you are who you are.

Lying on the table nearby is a magazine, with a cover picture of someone who looks quite different – firm, toned, tanned, sleek. There it is - they are who they are, and it looks like it is way more fun to be them than it is to be you.

You shake your head, and say to yourself, “it is time to get back in shape.”

The fitness premise is simple. There is us, there is them, but YOU can be one of THEM, if . . . you get yourself “in shape”.

Putting vanity aside, there are some real questions you should ask yourself about your personal fitness level, such as: “am I fit enough to do the things I want to do, and do them well?”

Process fitness is analogous to personal fitness in many ways. For process fitness the questions might be “can our team do the things we want to do, and do them well?”

Some of the similarities between personal and process fitness start with these questions. What does it mean to be fit? What does it mean to “do them well”?

Personal fitness might be defined as being good looking, participating in a sport you like, having a healthy cardiovascular system, being able to perform enjoyable every day activities (such as taking a walk in the evening), or in terms of being a world-class competitive athlete.

If you are successful, you may or may not get recognition for your effort. The lady shown here was featured in a major Women’s magazine, but recognition was certainly not what sustained and motivated her for the extended time she worked to lose weight and become more fit.

As to process fitness, fitness might be defined as being the envy of the other agile teams, being able to add more fun features, maintaining system performance under load, being able to apply maintenance fixes without user interruption, or producing ultra-reliable software for life critical applications. Your fitness goal might be strictly commercial - to sell a million copies of a mobile app, or to get a leg up on your competitor.

A lot of information about HOW personal trainers approach their work can be found online at the Personal Trainer Development Center (PTDC) website, http://www.theptdc.com/. Most of this paper was gleaned from pondering the lessons there, and selecting ones that applied to process improvement as well.

The premise of this paper is that there are many areas where personal training and process improvement are analogous. The similarities provide a rich source of potential lessons learned. The first part of the paper explores some of the high-level similarities and high-level lessons.
2. Lessons from personal training

Seven lessons are listed below; each is expanded in the following sections:

- Lesson 1: People are more interested in the product or outcome than the process
- Lesson 2: The process is a major contributor to the eventual outcome
- Lesson 3: Client needs differ, BUT,
- Lesson 4: For overall fitness, there are basics that are apply to everyone
- Lesson 5: As a coach or trainer, you need to lead by example
- Lesson 6: There are common paradigms for improvement
- Lesson 7: You will need to deal with difficult clients.

2.1 People are more interested in the product or outcome than the process

6-pack abs are 6-pack abs, no matter how you got them. A working app is a working app, no matter how it was developed.

People really don’t want to hear about your 4 AM mornings doggedly spent chasing the last bugs before release, the nuances of your development processes and bug tracking software, or the 20,000 crunches you did to develop your 6-pack abs.

Note: this begs the question – are 6 pack abs what you really want?

Although six-pack abs are attractive to many, it is the deep core muscles that need to be strong, as these are what support you. If you only strengthen the superficial abdominal muscles to the point of significant definition, this is actually over-tightening these muscles. There should be balance between flexibility and strength, and overdoing abs (or any other muscle group) can be counter-productive. But, if being attractive is your primary goal, you may make this choice.

Equivalently, does your app really do something useful that people need, or is it the commercial equivalent of eye-candy? What should it be?

The lack of attention to process and focus on what is immediately visible leads people to make a lot of interesting (and often suboptimal) choices. Fitness, like software, is filled with quick fixes – the “magic muscle pills”, the “wonder diet”, and the “only ab exercise you need” are equivalent to the elusive software “silver bullet”, you know, the tool that talks to the user and writes the software for you, all the while putting giant sums of money into your checking account.

Unfortunately, quick fixes don’t work in either arena, and don’t lead to either sustained performance improvement or overall fitness.

Another way to improve your fitness is the “do-it-yourself” approach, which actually can work. You can set goals for yourself, research methods for reaching them, and implement a fitness program. There are advantages to this approach. You own it, and it will work if you do your research well and are intrinsically motivated enough to follow through with your program.

With either a quick fix or a sustained do-it-yourself program, at some point you might realize you are falling short of your goals. When the realization hits, you have choices. You might:
• Change (or even abandon) your improvement goals
• Work harder at what you are currently doing
• Implement a new or modified improvement program to change what you are doing
• And/or hire a coach or trainer to help you modify your improvement program

All of these things can help, or hinder, your success. For example, changing your goals may make them realistic, but may also just be giving up. Working harder may cause a breakthrough, but also may fit into the definition of insanity - “doing the same thing and expecting different results”. Implementing a new fitness program may lead to success, or to “thrashing” from side to side without any forward progress.

Assuming you go the coach/trainer route, your new coach will undoubtedly work with you to clarify and improve your goals, motivate you to work harder, and suggest ways to change what you are doing that can lead to better results. Here, the role of a process improvement coach and personal trainer are very similar. You focus on the work; the coach focuses on the methods, and makes sure the methods are appropriate for your goals.

Hiring a trainer or coach is the antithesis of the quick fix. Not only is it a commitment to change, it is an acknowledgement that tapping someone else’s expertise is likely to achieve better results than going it alone.

For any successful fitness program, the results you see will come from having a plan and a method, following it, monitoring your progress, and making adjustments when needed. In other words, results come by following and improving a process.

2.2 The process is a major contributor to the eventual outcome

To a large extent, how you go about your quest for fitness determines the outcome. How you go about your work process determines the types of products you can successfully build and the services you can provide.

To improve your either your personal or process fitness, you will need to:

• Know where you want to be (motivation)
• Know where you are (observation)
• Have plans and methods (preparation)
• “Do it” (perspiration)
• Monitor progress (recalibration)
• Experience success (celebration)

As a trainer or coach, you can help with everything, except the perspiration part. You can’t lift the weight, swim the lap, or perform the software testing for your client. Your goal as a trainer is to improve your client’s chances of success, not to do the work for them.

Imagine you are a personal trainer who was hired by someone’s spouse to “get them into shape”. They show up for Session 1 and they make it clear that their idea of being in shape is being able to walk to the refrigerator for a snack and some beer, and their favorite sport is golf. On TV. Nonetheless, you work hard to develop a program for them. The program you “mutually” agree to
includes weight training for strength, specific cardio work to facilitate weight loss, and a yoga program for flexibility on their rest days.

You try to keep them motivated by reminding them how happy their spouse will be if they succeed in meeting their weight loss goals, and you work to interest them in other pastimes that are conducive to fitness. In week 12 of the program, the spouse calls to tell you they are getting a divorce. How well do you think this will work out?

In a previous job, I was hired by a Senior Vice President to implement a process improvement program with two goals – passing a compliance appraisal, and improving operational efficiency. Things were moving along swimmingly until she retired. Immediately, all cooperation disappeared, and I realized I was in the same position as my hypothetical personal trainer. I’ll leave you to guess how it worked out. (We did pass the compliance appraisal . . .)

You can help your client build and sustain their motivation, but you can’t create it from nothing. And, without sustained motivation, sustained improvement won’t happen.

2.3 Client’s needs differ

Realistically, process improvement or personal training alone is NOT enough. Although it is tempting to recite the mantra “the quality of the process determines the quality of the product”, in the real world, high quality workouts and premier personal training will not turn me into the next heavyweight champion. There are several reasons for this unwanted reality intrusion - I am too old, too small, and have some minor health issues that will prevent me from ever reaching this goal.

A more realistic mantra for improvement is the old recruiting slogan “Be all you can be.” For me, completing a duathlon or half marathon, doing 100 pushups, or lowering my cholesterol by 20 points are much more realistic goals, and probably better for both my mental and physical health than chasing an impossible dream.

The training needs for an elite, world-class competitive athlete are very different than mine. Even among elite athletes, the training protocols for a marathon runner, power lifter, or boxer will be very different. The marathon runner will need techniques to build speed and endurance; the power lifter needs brute strength and explosive quickness, and the boxer needs a bit of everything.

But, a more typical personal training client might be interested in weight loss, optimizing their skills for the weekend softball league, meeting a specific goal such as completing a marathon for the first time, or improving their performance in an activity they have already mastered.

This is analogous to process improvement in software development. The team may need to make release schedules more consistently, fix a customer’s perception of poor web site quality, improve the burn down rate so people can spend more weekends at home, create a high performance system that can handle a million hits during the Super Bowl halftime, or field error-free safety-critical systems.

Part of your job as the process coach is to tailor the process improvement (or workout) plans to the client’s needs. You also need to make sure you are the right coach for the client. An Olympic power lifting coach may be intimidating to a small-framed woman that wants to lose weight, and may seem completely irrelevant to a marathon runner that wants to shave 10 seconds per mile off her time. Analogously, a rigorous performance model may be irrelevant to a small, single user app.

A final note on client needs – the goals the client expresses may not be the real goals, the goals that are driven by their core values or fears. You will need to dig a bit to find those.
2.4 For overall fitness, there are basics that apply to everyone

One thing you will find is that there are fundamentals that apply to almost every client.

For personal fitness, some level of cardio training, strength training, and flexibility (or mobility) training are needed for a balanced program. Everyone will benefit from strength training, although the nature and intensity of that training will differ significantly.

For software development, requirements development, configuration control, release management and testing are among many basic processes that need to be performed well no matter what the software is, although the way those activities are done will differ depending on your goals and methods.

Also, in both personal and process fitness, the need to articulate the improvement goals and plan the process is essential. For success, the client (individual or team) will need to actually do the work. Along the way, you and the client will need to monitor progress and make adjustments based on reality. As a coach, this means you will need to have a system to track your client’s progress, and have the credibility to provide feedback.

When the world intrudes, you and your client will need to recalibrate. A bout of pneumonia may put their marathon plans on hold, and if two team members leave you may need to delay process improvement changes to make the date for a scheduled release.

In addition adjusting to external factors (you do have a risk management plan, don’t you?), you need to keep in mind that keeping the team motivated is always a primary goal. Any technique you use to motivate people won’t work well if you don’t set an example.

2.5 As a coach or trainer, you need to lead by example

As examples - don’t tell people to do an exercise you can’t do (there are very rare exceptions to this for elite athletes). Don’t lecture people about watching their diet while snarling down bacon cheeseburgers and a large order of fries.

As a process coach, don’t implement documentation standards that you wouldn’t follow yourself, and don’t prescribe metrics unless you are willing to set a personal standard for using metrics as well. In the jargon of the process improvement trade, “drink your own tea.”

2.6 There are common paradigms for improvement

For process improvement in its simplest form, this is exemplified by Shewhart’s plan-do-check-act cycle. There are hundreds of variants; here is one that could be applied to almost any improvement program.

• **Motivation.** This is the starting point, the belief that things can be different than they currently are; motivation provides the inspiration for change.

• **Observation.** You will need an accurate assessment of the current status for planning improvements and selecting the right methods.

• **Preparation.** You know why (motivation), you know what (observation), now you need to chart the *how* – planning and methods.

• **Perspiration.** It is really unfortunate, but the plan won’t implement itself, unless the plan is to do nothing.
• **Recalibration.** You will need to check your progress, and also will need to incorporate changes due to changing circumstances. Both require ongoing observation and honest re-evaluation.

• **Celebration.** This comes with achievement, and can mark the end of an effort, or the beginning of a new improvement cycle.

With all of these lessons in mind, what could go wrong? Well, you might encounter “people problems” along the way, in many forms. Sometimes it will be explicit or unintended resistance to the change effort, in other cases, a difficult client or team member may be the problem. People are the problem, and the solution to the problem is the people.

### 2.7 You will need to deal with difficult clients

Alas, even though they pay for your services, clients aren’t always easy to deal with or totally on board with your program; ditto for the process improvement team members. This holds true for personal trainers as well as process improvement coaches.

I was attracted to advice provided by Jonathan Goodman about difficult clients, and found myself chuckling because I had encountered each of these characters in the different context of process coaching. So, here are some “typical” difficult clients, along with some strategies for dealing with them.

**Note to the Reader:**

The format of these examples is to briefly describe the personal training client, describe the challenge, summarize Jonathan’s way of addressing the challenge, and then relate it to process improvement coaching.

These examples are paraphrased (or quoted directly) from Jonathan Goodman of PTDC, and can be found on the PTDC website or in his book “Ignite the Fire”. Any errors from the paraphrasing are mine.

As you read these examples, think about people in your organization that are involved with process definition, management and improvement. Some of these characters may seem strangely familiar (you may even resemble one of them yourself.)

Ask yourself, “Would these strategies work to motivate people in my environment?” Finally, keep in mind that while we are primarily discussing the client, the description may also apply to one of the team members on the process improvement team.
3. A personal trainer's view of dealing with difficult clients

3.1 The Alpha Male

From Jonathan Goodman:

He was an A-type. About as much of a know-it-all personality as I've ever come across. He was more interested in telling me about his self-prescribed workout than getting my advice. He wasn't in the gym because he wanted to be there; instead, he was coerced into coming. So when I met him I knew I would have my work cut out for me.

Challenge for the Alpha Male.

There is one overriding challenge: establishing a relationship where you are perceived to be an equal. Without equality, your advice will be ignored.

Techniques for dealing with the Alpha Male

Here's what I did:

1. Sat down and listened to him. I needed to gather as much information about his own workout as possible to generate my plan. I let him talk and took notes. I made him speak about his pain and how the artificial hip had limited his ability to do activities he loved, like hiking.

2. I didn't perform an assessment. He would not have listened to me at this point because I hadn't shown my value. Instead I let him show me his warm up. At the end of the day I prescribed a 10-minute warm up for him. That was all. I asked him to have it done before we met 2 days later.

3. Instead of showing him an exercise during the next meeting I asked him to show me the exercise that I chose. So I would say, "show me a pushup", and watch.

This was what shifted the power relationship. One of two things happened when I asked him to show me the exercise.

• He had no clue what it was. Mission accomplished. I was now free to instruct.

• He knew the exercise and would show me. Here I used what I call the "Sandwich" technique. It has three parts:

  a) I told him something he did well in the exercise.
  b) I asked him to improve upon one or two of the most important facets of the exercise. (This part of the sandwich is stuff that really isn't good.)
  c) I finished with one more point he did well.

The Sandwich technique worked beautifully. By stroking his ego first, he was more willing to listen and take instruction.

Sometimes you need to be a bit creative when dealing with clients. Don't jump into the instructor role right away. By stroking alpha-types egos you can slowly shift the power without hurting their ego and increasing resistance.
3.1.1 Analogy for Process Improvement Coaches

For me personally, it has always been tempting to go toe-to-toe with the Alpha male, particularly if you have executive sponsorship backing you.

However, harkening back to my earlier story, that is exactly what I had done with the Alpha Male on the team I was hired to lead. When my sponsor retired, the Alpha Male went out of his way to sabotage the effort, and he had 30-plus years of political connections inside the organization. Even though I won the initial battles, I lost in the end, and, so did the organization. Big time.

Next time, I’ll listen more, and try a Sandwich. It may or may not avoid all confrontations – but it may help to transform the power relationship into a peer-to-peer collaboration.

3.2 The Content Cathy

From Jonathan Goodman:

The Content Kathy is just happy to be exercising. This client had a previous injury with loss of function. Because of that previous injury she was ecstatic to be exercising again. A Content Cathy could also be an elderly client who is happy just to stay active and maintaining their function. The Content Kathy doesn’t care about progression or pushing heavy weights. They love lots of stretching and ‘feeling’ the body working. They may also resist quantifying progress goals, because they feel trapped by numeric goals.

Challenges for Content Kathy:

Despite not having lots of hefty goals that you, as their trainer, are accountable to, the Content Kathy usually has a host of concerns. Keeping them healthy is the biggest challenge. A secondary challenge is often that you may want all of your clients to push themselves hard and get stronger. The Content Kathy loves working out but doesn’t want to work hard.

Techniques for dealing with Content Cathy

The Content Kathy needs some direction. They’ve come to you because you have the knowledge to help them with their problems. Your job is twofold:

- Organize their workouts in a safe and efficient manner.
- Provide a subtle push and pleasant conversation.

Sneak in the assessments without making it overt, and couch improvements in terms of doing something new or fun, or in terms of injury prevention.

The key in dealing with this client type is to be willing to veer from your training model and mold yourself to their needs. Have some fun. You have to accept that you can’t get this client the kind of results that you expect from others because they don’t want to push themself. Sometimes as a trainer it’s difficult to not expect hard work from clients we want to push. You must accept the [valid] differences in reasons for exercising and work within them.

3.2.1 Analogy for process improvement coaches

A team that is close to retirement and doing maintenance releases for a legacy system may not be interested in improvement if it involves a lot of change. Keep in mind, the team members that wanted to
push hard into new frontiers left the team years ago. Changes may have been tried in the past, and they led to crashed systems and/or unhappy customers (the equivalent of an injury).

The system is quirky, and their process is quirky too. The process probably has a lot of home grown checks and balances that have evolved over time because of specific aspects of the system environment. But, the process probably isn’t very efficient. Roll with it.

You may be able to implement some improvements while planning for the team’s transition to the next project, to facilitate handing off the system to another project team, in the guise of risk avoidance (equivalent to injury prevention), or if team members see the improvements as a way to stay employed a few more years.

Analogously to the way Jonathan handled his client, you may need to perform process assessments quietly, to avoid the perception that your are judging them or holding them to unrealistic goals.

### 3.3 The Busy Bill

**From Jonathan Goodman:**

> Time is the issue with the Busy Bill. He runs in on his cell phone and rushes out the minute the workout is done. Sometimes during the workout he’ll even stop to take a call.

> This client understands the value of working out and usually wishes that he could be more consistent. Their busy schedule forces them to cancel regularly without knowing when they can reschedule. They’ve simply taken on too many things in their lives. It’s impossible to program even short term.

**Challenges for Busy Bills**

Getting results for a Busy Bill is difficult. They work out sporadically so any programmed progression is close to impossible. In addition, because their lives are so busy, stress gets in the way of regular workouts. The typical Busy Bill’s eating habits are usually sub-par and a weakened immune system due to stress may cause frequent illnesses and missed workouts. From a scheduling point of view, he can be frustrating because of the frequent cancellations.

**Techniques for Dealing with Busy Bill**

I enthusiastically took on a Busy Bill when their previous trainer left. The guy already had great form and always seemed to both work hard and have a great time. He had an athletic background as well.

My training with BB started off great. I got him back on track and laid out a long-term plan for him that he was excited about. BB started to monitor his eating, cut down on his alcohol consumption, and diligently completed his cardio. He was losing inches and gaining strength, but then work started to take over BB’s life.

Making time for exercise became close to impossible. When he did make it in, his attention was elsewhere. The stress caused him to increase his alcohol consumption, and the gains he had made over the past 3 months disappeared quickly.

I was frustrated, but I wanted him to stay active during a difficult time in his life. So, I decided to switch our focus. I gave him two simple 30-minute workouts and some homework. Every time he was feeling stressed or overwhelmed, he could come into the gym on his own and complete the workouts.

**My goal was to make the gym his sanctuary.** In the meantime, I cancelled all of our organized sessions and told him to call me if he wanted to book a session. This pattern lasted for nearly 5 months. During that time, he didn’t make any progress, but he did continue working out, which was my primary goal.
If your Busy Bill’s life is always going to be stressful, here are some additional ways to deal with it.

• Don’t overwhelm a Busy Bill.

• Do a mini-assessment every time the client walks in. His physical and mental state will be a wildcard. Some days he will come in relaxed, and excited for a break in his routine. Other days he may be so stressed he can hardly move. It’s important to read your Busy Bill and take as much time as needed.

• If you find that his mind is jumbled it’s probably a good idea to nix work that requires a lot of clearly focused attention.

• Give homework. Twenty minutes of light exercise, even if it’s before bed, will help them feel good when they can’t get to the gym and give them something to look forward to.

• Finally, if Busy Bill refuses to leave his cell phone in the changing room, hold it during the workout. If someone calls, I tell him who it is and ask if he needs to take the call. That way he only answers the important calls, and can let others leave messages.

3.3.1 Analogy for process improvement coaches

The IT industry is full of Busy Bills, and their counterparts, the Busy Barbs. There are often a few key players that are essential to any sustained improvement effort. The program manager (PM) comes to mind, and the PM job either breeds or attracts Busy Bills.

In the same way Bill knew exercise was important, the PM knows that process improvement is important, but often the process improvement payoff is long range and corporate, such as better company performance on the next program or project, or a competitive advantage in a future bid. But, the PM’s focus is immediate and pressing, often with contractual obligations that supersede everything else.

So, process improvement is crowded out by day-to-day demands. In Stephen Covey’s terms, the urgent overwhelms the important.

Most of Jonathan’s strategies will help. In addition, there are three implicit strategies that Jonathan used but did not articulate fully. They are to:

(1) Simplify, simplify, simplify. This keeps you from overwhelming your Busy Bill; keep them focused on one or two critical things that will move things forward until there is more time.

(2) Eschew timelines for improvement. Especially, don’t box yourself in with fixed dates for meeting goals that depend on Busy Bill.

(3) Build a relationship that will allow more focused work when (and if) the crises du jour passes.

Following Jonathan’s model, continually assess the PM’s mental condition. Do they need to blow off steam? Provide a vent. Try to become the PM’s sanctuary. If they are unable to keep regular appointments, study their routine and find ways to be visible, catching them in the hall.

Give them homework by asking for specific short-term help on critical items. For example, “I need you to push the test team a bit to finish evaluating the new tool. I know they are very busy, but we can’t implement it in time for the next release without the evaluation.”

Good luck with the cell phone thing. If you figure out how to get the PM’s phone, let me know. You may be able to get the PM’s assistant to screen calls during your meetings. One thing I have seen work during
larger meetings is to get the PM to announce that everyone needs to turn their cell phones off. Then they will obligingly set the example.

3.4 The Assiduous Monster

From Jonathan Goodman:

*The Assiduous Monster is the hardest working person in the gym, day in and day out. This type of client loves to “feel the burn” on every exercise, and he won’t stop until he’s given everything he has. He leaves the gym exhausted after every workout, and rarely misses a day of training.*

*You may be thinking – “So what’s wrong with that?”*

**Challenges for Assiduous Monsters**

It’s difficult to convince Assiduous Monsters to slow down when needed. But going all out every workout may eventually lead to injury and in order for progression to happen, you have to program lighter days among the tough ones.

After years of training, the Assiduous Monster may also have bad form along with significant injuries and imbalances that must be fixed. A thorough assessment will help you determine how to address these issues.

**Techniques for Dealing with an Assiduous Monster**

These clients have usually participated in exercise programs before, but the programs probably weren’t well rounded. They may have focused on strength training while ignoring mobility and cardio, for example.

Assiduous Monsters may not see the value of a personal trainer, so your first step should be to educate them on the benefits of working with somebody who has the requisite knowledge and passion—namely, you.

A full assessment will reveal what the Assiduous Monster needs to work on, so be frank in telling him what needs to be done. By showing him his weak points, you’re giving him a challenge, and his personality will have him chomping at the bit to fix his imbalances.

You must take charge when working with Assiduous Monsters. Don’t let them dictate their workouts; you’re the trainer. Make sure they’re aware of why and how your plan is different from what they were doing before, and most of all, that they know how it’s going to help them.

If the Assiduous Monster refuses to change his ways, encourage him to look elsewhere for a trainer. The short-term gain of training the Assiduous Monster is not worth hurting your reputation, or worse yet, a lawsuit if he gets hurt.

3.4.1 Analogy for process improvement coaches

By analogy, the Process Monster has participated in improvement programs before, and may wonder why everyone else didn’t improve. They may have extraordinary skill with a particular tool or method—say 6-sigma or a particular estimation method—but may not see that their approach is unbalanced and doesn’t fit all projects.

They probably don’t understand why the organization hired a coach – after all, they have the key.
The Process Monster may be the executive who is sold on a tool or method, and wants it all done now. Or, your Monster may be an over-enthusiastic improvement team member whose missionary zeal for their part of the solution turns off key players on the development team.

The Process Monster may expect everyone else to work as hard as they do. After all, any team member assigned to work on process improvement half time is only expected to work half days. As in, there are 24 hours in day, so a half-day is 12 hours.

In both cases, you probably have a person who knows intellectually that process improvement is only one of many things happening in the organization, but has trouble backing off.

In process improvement, like sports, timing is everything. Implementing the new test tool without having the testers and developers ready to use it is usually an exercise in futility. Rolling it out in the middle of a new release will affect the schedule—in a bad way.

As Jonathan noted, you have to take charge. If your Monster can’t be tamed, then they need to be taken off the process improvement team. If they are sponsoring the improvement effort, then you may need to move on.

3.5 Aerobics Alice

From Jonathan Goodman:

Aerobics Alice doesn’t care about form. She wants to look good and wants to feel each workout, but she’s not interested in detailed explanations of exercises, workouts, or the physiology behind them. The Aerobics Alice has already been active by taking exercise classes or working out with friends. She’ll see you as a tool for quicker results and will hold you accountable if she doesn’t get them.

Challenges for Aerobics Alice

The Aerobics Alice client forces you to walk a fine line. Focus too much on form and you’ll lose her, but focus too little on form and she may get injured. Without proper form, progression is impossible, which makes it hard to improve beyond a certain point. Without improvement, there are no visible results to show, and you will lose the client. This leaves you in a difficult position.

The Aerobics Alice often has bad habits to address as well. It’s not uncommon to re-teach exercises weekly. The Aerobics Alice may also want to work out with friends between sessions, which can make it hard for her to stick to the routine you establish. Therefore workout adherence between sessions may be low.

In one case, my Aerobics Alice told me that she wanted the workouts to be faster paced, and I pretended not to hear. To my surprise, after our initial sessions, she dropped me as a trainer. Some time later she came back for more sessions, and I agreed, but only after I negotiated a longer-term contract.

[Authors Note: In many cases, he would have lost the client forever. If Alice were a typical development manager charged with implementing a process improvement effort or a new software development tool, this would have been “all she wrote”.

Techniques for Dealing with Aerobics Alice

There are two basic approaches to take with a typical Aerobics Alice client. You need to recognize that your client will go back to group exercise classes or working out with friends, and prepare her for it. Add some aspects of group exercise into your workouts and focus on proper form, and you may be able to keep the client on an irregular but continuing basis, such as once a week or even once a
month. For example, invite her to bring her friends to the session (for a nominal charge).

Alternatively, you can take a hardline approach. If you think that Aerobics Alice would benefit more from your training than from what she was previously doing, tell her. Just keep in mind that it’s her goals that matter, not yours.

If you do take this approach, it has to be an all-or-nothing conversation. You cannot bend on your opinion of the most effective way to train. If she refuses to buy in after you’ve extolled the benefits of your system, move on. But I’ve found that often clients respect the hardline approach because you have their goals in mind and are holding true to your values as a trainer.

3.5.1 Analogy for process improvement coaches

The first step is to determine the decision-making mode of the client. An “Aerobics Alice” is likely to be more collaborative and group decision focused – just as she wants to work out in a group class in the gym, she will want everyone to be part of the team in the work place. This is not a bad thing for a process improvement effort, and actually will help things along if channeled correctly. She may be socially focused rather than intrinsically goal driven. For a socially focused person, gaining team consensus is more important than achieving a metrics-based improvement goal.

She may also be motivated by appearances. This may express itself as a form of risk aversion—“don’t do anything that would make us look bad”. Alternatively, it may express itself as “We need to change this because it will look good to the VP.”

Based on her decision making model, you can “sell” necessary changes as ways to involve the group, ways to reduce risks, or ways to showcase the team. If consensus is involved, be prepared to take some extra time.

The second step is to listen. When any client tells you that what you are doing isn’t working, you need to find out why. It may be there are critical players that need to be involved, or that the processes you are developing don’t fit the group or client’s needs. Your client may not see the connection between an improved Configuration Management system (your goal) and reduced customer complaints (her team’s goal), so you need to make the connection.

If you can’t gently “sell” the improvements you are working on, you will need to change your approach or take a hardline – and be ready to walk away.

3.6 The Quiet Assassin

From Jonathan Goodman:

This client kicks butt! They’ll come into the gym every time and give you 100%. It won’t matter how their day went. This is convenient because they’ll never speak about their day.

In fact, the Quiet Assassin will never speak about anything other than the workouts and, even then, conversation is few and far between. Getting any information about this client’s work, family, or social life is like pulling teeth.

Challenges for the Quiet Assassin

It’s hard to gather any information about the Quiet Assassin. This makes establishing a relationship difficult. Every workout is like a bad first date. You will receive one-word answers to every question that you ask a Quiet Assassin. They won’t ever ask anything about you.
Since you never know where the Quiet Assassin’s head is at, programming in long-term progression is difficult. They’ll tell you that they’re going on vacation the day before they leave, and often have a preset (and un-communicated) notion as to how long they want to train with you. Getting a grasp on the Quiet Assassin’s goals can also be tough. You will find that you catch yourself falling into the trap of disorganized sessions. In addition, any scheduled rest will consist of an awkward silence. Any questions are followed by a one-word answer before the silence returns.

Because of the lack of feedback, dealing with the Quiet Assassin forces you to second guess yourself and make [possibly bad] assumptions about what their goals are. Retaining this client is difficult because you lack the relationship that you’re able to build.

**Techniques for dealing with the Quiet Assassin**

The best advice that I can give in dealing with arguably the most difficult client type is to stay the course. The Quiet Assassin has issues that they’re dealing with and sees the gym as an oasis. It’s important for you, as their trainer, to not get offended when they don’t share any information about their personal life with you.

Because she worked so hard and was internally motivated, the trap that I felt myself falling into was becoming complacent.

You might feel like you’re caught up in a bad relationship. You’ll be working hard planning the workout and trying to get closer to the client. The client, on the other hand, won’t seem appreciative and it’s easy for you to get frustrated. It’s not your job to be their psychiatrist. It’s your job to give them a great workout and educate them properly. By sticking to your guns and always giving them a great workout you’re providing the best service possible for that client.

I promise that if you keep showing the Quiet Assassin respect and resist getting complacent they will pay it back.

**3.6.1 Analogy for process improvement coaches**

Your client for the process improvement effort may be massively introverted. This may mean they are not engaged, it may simply mean they don’t talk much, or are dealing with personal issues that are, frankly, none of your business.

For some introverts, you may need to find communication channels that are more comfortable than face-to-face (some engineers really prefer e-mail.)

You will need get creative and find other ways to check their support for the effort. A simple way to do this is to ask for help, assigning a homework task more involving than “read and approve”. For example, ask for a visible sign of sponsorship. “Can you please send out a note stressing how important it is to attend tool training? There is some resistance and a nudge from senior management will help.” Then wait. Don’t draft the note for them – tell the sponsor it needs to be in their words. This will help you gauge their understanding of the process improvement effort, and their level of involvement.

I had a sponsor for architecture reviews who scheduled a review for every major release of the products under his control. We never got any feedback directly, except once, when we wrote a finding questioning the business case for a product. He told us that was out of scope for us (I disagreed, so I found another way to word the finding.)

I found out later he was trying to protect the team from a layoff, hence did not want anything in writing that would call the overall effort into scrutiny and make it a target for cuts.
Despite our one disagreement, he kept scheduling reviews, and his teams kept correcting the findings. The dynamic of his organization was that the reviews were the acceptable way for teams to bring issues out into the open, and provided him a venue for correcting things that might not get addressed otherwise.

All in all, an absolutely awesome sponsor, and I didn’t even know it until afterward.

3.7 Challenging Charley

From Jonathan Goodman:

The Challenging Charlie knows everything thinks they know everything. They’re skeptical of you and your gym and won’t commit to anything long-term. This client type may be experienced in exercise or may not be. Often the Challenging Charlie has done research prior to starting an exercise program.

It may seem like they’re testing you early on. In fact, they are.

In many cases, they have been trained badly in the past, and are working from a model of “once burned, twice shy.” Charley may come across as being quite a jerk, when in fact he is just jaded.

Challenges for Challenging Charlie

Challenging Charlie doesn’t leave himself open to a lot of conversation. Your questions will be met with one-word answers. They’ve often done some research before meeting you and therefore want to test you before they commit to working with you.

On one hand I love it when clients take on the task of self-educating. The problem is that their research is usually internet-based and not always accurate. Setting out a long-term plan with Challenging Charley is difficult due to the inaccurate information they have and their lack of commitment. They’ll stop you midway and remind you that they haven’t signed up for anything yet.

Charley may refuse an assessment, on the grounds they haven’t committed to anything, so why waste time?

Techniques for Dealing with a Challenging Charley

Since the Challenging Charlie’s resistance stems from bad experiences, it’s important to take your time to educate them on how your approach is different.

Your plan of action has to change. Since Charlie refused an official assessment I secretly worked the assessment into the first 3 workouts.

After each exercise I would take a minute to tell him what was going on in detail. When I came to know his patterns, I started to answer his questions before he had a chance to ask them. As the workouts went on Charlie gained more faith in me. I made sure to show him that I had a reason for the exercises that he was doing. I like the process of educating a Charley before they ask. Before every workout with this client type I’ll take 5 minutes to explain my plan for the day and why I’m doing it. By closing all the doors to objections before they raise them you prepare yourself for success.

The Challenging Charlie should be a short-term problem with two possible situations emerging.

• You don’t explain yourself well. They’ll quickly give you the boot as their trainer.
• You explain yourself well and prepare for their questions or, better yet, answer their questions before they ask them. The Challenging Charlie will shift into a long-term client with a great understanding of exercise in addition to having faith in you.
3.7.1 Analogy for process improvement coaches

A senior process improvement coach told the story of going into an engineer’s office to talk about the improvement program they were starting. As he began talking, the engineer quietly reached into the desk drawer to retrieve a pocketknife. He then used the knife to cut a notch into the expensive wooden top of the desk.

The consultant, startled, looked at the desktop and noticed a row of 8 notches. “May I ask why you are cutting notches into the desk?”

“Yes.”

Silence. (This is Challenging Charley at his best – you asked if you can ask the question, now you have to ask the question.)

“Why are you cutting notches into your desk?”

“Each notch represents a new whiz bang program that is going to straighten out all the problems here. The programs go away, the problems remain, and this is my record of it.”

Better have a plan, and facts, and persistence.

There is a trap here. A continual stream of challenges may be a deep-seated resistance to the effort, stemming from another cause. To succeed, you will need to find and address the root cause of the resistance. Where Jonathan was able to win over his Challenging Charley by anticipating his questions and having a greater level of expertise than the client had, you may not be in that position. The software development field is so complex, no one can master all aspects of it, and Charley may have specialized expertise you don’t have. Then you have to co-opt their expertise and make it part of the change plan.

One way to do this is to ask the Challenging Charley what they would do. They may respond with a detailed story about a previous improvement program they were actively involved with. Then ask – “How did that work out?” They will often reply with a diatribe about how it failed because of X, Y and Z. This gives you an opening. The follow up question is, “How can we address those barriers?” If Charley has an answer, make them responsible for the result, incorporate it into the plan, and step aside. If there isn’t a good answer forthcoming, then in the best case you can suggest trying something new (with some buy-in), and in the worst case, they will sideline themselves along with their challenges.

For example, during a risk identification session I was challenged by a mid-level manager “Why are we wasting time with this, when we already have standard lists of the problems and risks?”

My response: “That should save us some time! Please bring me the standard list, I will gladly include those risks in the prioritization sessions long with the ones we identify in the interviews.” No list was forthcoming, and the man disappeared, leaving the other managers free to work on the risks and issues they identified.

3.8 Always Off Track

From Jonathan Goodman:

The Always Off Track client never focuses on the workout. It’s constantly a struggle getting this client to give 100%. They enjoy your company and are happy to chat about whatever pops into their head. On the bright side the Always Off Track client makes time fly by entertaining you with stimulating conversation.

Challenges for Always Off Track
Focus! Your job is to get the client results. Results are what they came for and they won't get them unless they're engaged in their workouts. Also, if they're not focused on the exercise then you will have to repeat yourself constantly. Getting the Always Off Track client to complete their workout in the allotted time can be a challenge, since 45-second breaks inevitably turn into 3 minutes.

This client will also get bored with your workouts since they don't take the time to dive in and understand the purpose. They constantly ask you to change it up.

Lastly, the Always Off Track client is an avid reader and, since they are now excited about fitness, will want to try every new invention or workout regime. You'll find that you spend a lot of your time at the beginning of sessions explaining whatever new fitness trend is out there [and why they aren't doing it today].

Techniques for Dealing with an Always Off Track Client

The Always Off Track client might take a little creativity. Your goal is to figure out a way to increase their focus without losing sight of their goals. Using a stopwatch works well, as it communicates a strict end to the break. "When you hear the beep, you go!" “Positive punishments” such as plyometric pushups for non-compliance may work well.

Sometimes all it takes is sitting the client down, revaluating their goals and making sure that they buy-in to the program. The Always Off Track client might talk because they don’t know what else they should be doing during the breaks. When I feel that’s the case, I make sure to educate them on the importance of staying focused and teach them visualization techniques.

I’ve never had an issue where a client has gotten bored of the workout that I’m putting them on – but, it may take some extra work on your part to ensure this. Boredom [often] stems from a lack of understanding on the client’s part. If you explain your workout, progressions and vision properly to your client you won’t have an issue. They’ll be motivated by small consistent progress because they know what to look for.

Analogy for process improvement coaches

Ah yes, the always off track team or client. Meetings that drag until everyone’s bladder gives out because the senior architect keeps talking, the manager who always wants to implement the latest buzzword trend, the free spirit who has wonderful creativity but no follow through, or, better yet, a team with all three aspects in play at the same time.

By analogy to Jonathan’s stopwatch and beeper, meeting management is a must. Agendas help. Timers help. Hard stops help. “Parking lots” help. Standing up helps. Agreed upon “penalties” for meeting tangents help. I heard of a manager who replaced the meeting room clock with one that had dollar amounts on the dial to show the mounting cost of the meeting in real time. A trained facilitator to keep it all moving forward is invaluable.

You may be able to distract the senior architect by asking them to come to lunch with you and tell you more about the fascinating approach that worked back in ‘82, while reminding them that there is a hard stop today. This protects the other team members, and you may learn something as well.

Jumping from trend to trend is tempting for many managers, but trying to do too many things in one improvement cycle is lethal, and in many cases, the efforts may be orthogonal. For example, if you have trouble managing release configurations for four hardware platforms now, adding the additional complexity of supporting mobile devices and a mobile testing lab is not a good idea right now. If security is an issue, moving critical data storage into the cloud is unlikely to help.

Pairing people with unlike temperaments is another technique that can help a lot. For example, if the free spirit can be paired with a slightly anal detail wonk, they will drive each other nuts, but may achieve great
things. They will need to be rewarded and praised as a mini-team, and you may need to educate them about how their differing strengths complement each other.

4. Summary

Reasoning by analogy is always suspect, and while it can lead you to insights, it can be misleading as well.

The premise of this paper is that there are many areas where personal training and process improvement are analogous. This occurs naturally because the focus in both cases is on changing the way we do things to achieve better results. The similarities provide a rich source of potential lessons learned, but they must be applied judiciously. Any time you reason by analogy, there are areas where the analogy won’t hold, and may even be misleading.

For example, there are differences between individual difficult clients and teams. The personal training analogies may hold with individuals on the team or sponsors of the process improvement effort. However, they totally fail to account for team dynamics that may mitigate or exacerbate individual weaknesses.

A final word - avoid complacency; by some measures, the fitness business is failing (and process improvement isn’t doing much better). The number of obese Americans is going up, to the point that it has been described as an epidemic. This is occurring in spite of boatloads of evidence linking weight to heart problems, strokes, and diabetes.

According to the University of Scranton Journal of Clinical Psychology, 12/13/2012, 45% of Americans make New Year’s resolutions, and of those, the biggest number have to do with personal improvement or weight loss. And, although people are ten times more likely to meet their goal if they express them explicitly as a resolution, only 8% of people achieve their resolution; 92% have partial or no success.

While this is only one survey (beware of cherry-picked data), it showcases a simple fact—improvement is hard. Although a LOT of effort and money is spent on it, based on results, much of it is misspent.

In the process improvement field, data from Crosby (Quality is Free) and others indicate that almost 80% of improvement efforts fail to meet all of their success criteria.

In both cases, while coaching improves the chances of success, there is a dearth of hard data to substantiate this. In fact, we can cherry pick data to contraindicate coaching. For example, in a ten-team football league, there is one team that is the champion, so by one measure, 90% of the coaching efforts can be categorized as failures, or partial successes at best. (Since all of the teams have coaches, there isn’t a control group to determine the success rate of un-coached teams.)

Elite athletes have coaches, the “biggest losers” have coaches, and Little League baseball teams have coaches. Successful coaches provide scholarship and domain knowledge, motivational skills, encouraging words when the going is tough, impartial evaluation of progress, and a bit of “tough love” when needed. This combination makes the difference between mediocrity and being the best you can be.

References and Credits

This paper draws on 30+ years in the IT field, most of it spent in product reviews, risk management, quality management, and process improvement.

The bulk of the personal training stories are lifted directly with minor modifications from Personal Trainer Development Center (PTDC) website: http://www.theptdc.com/.

I would be remiss if I did not mention my intellectual debt to Jerry Weinberg, Watts Humphrey, and W. Edwards Deming.