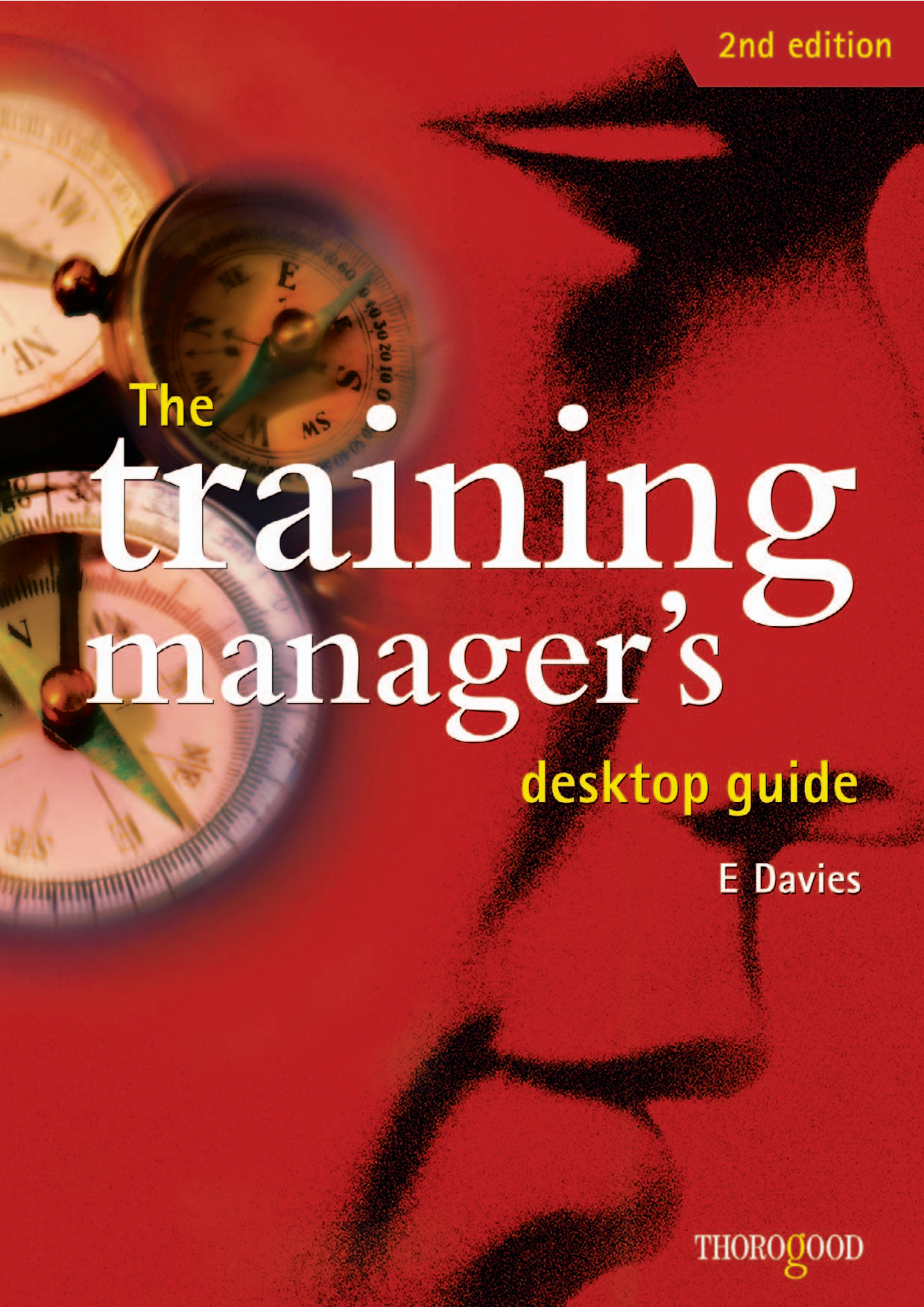
2nd edition
The
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The Training Manager's desktop guide

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Eddie Davies

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Eddie is a Human Resource Development specialist with over 25 years experience gained with national organizations as a manager, trainer, consultant and coach. He moved into training and development following 12 years experience with the Manpower Services Commission during which time he became the Regional Marketing Officer for all 120 London job centres.

He is a professionally qualified and highly experienced HRD consultant with extensive knowledge and skills in leadership and management development. He specialises in developing managers and staff in the public service sector in times of increasingly rapid change. His main focus is to enable managers to develop their potential, professional effectiveness and the key interpersonal skills to make them more effective in managing people and delivering excellent business performance.

He established his own consultancy in 1989 and his work since has involved him in extensive travel throughout the UK, working both with his own clients and as an Associate with leading consultancies. He has provided training and development for clients in the health service, local and central government, university business schools, executive agencies, public utilities and national charities.

His expertise has been recognized by Fenman Training who awarded him *'Author of the Year'* for his best-selling *Unlocking Your People's Potential,* the Association for Coaching who invited him to join their Coach Accreditation Panel in 2006 and the Chartered Institute of Personnel & Development who upgraded him to Fellowship based upon his work with senior managers.

His other publications include:

- *Interviewing Skills* – Fenman, November 1993
- *Unlocking Your People's Potential* – Fenman, November 1995
- *The Manager as Trainer, Coach & Guide* – Fenman, January 1997
- *The Project Management Activity Pack* – Fenman, June 1998 (Revised 2005)

- *Essentials of Management* – Fenman, June 1999
- *Light Bulb Learning* – Fenman, January 2001
- *Motivation in Practice* – Fenman, September 2001
- *Essential Interpersonal Skills for Managers* – Fenman, April 2003
- *Management Essentials* – Training Journal, April 2006
- *Managing Age Diversity* – Fenman, July 2006

Eddie welcomes feedback on his work and he can be contacted via his website **www.eddiedavies.co.uk**

Icons

Throughout the Desktop Guide series of books you will see references and symbols in the margins. These are designed for ease of use and quick reference directing you to key features of the text. The symbols used are:

Definition	References
Example	Checklist
Practical pointers	Activity point

Contents

Chapter one

The training management function

Introduction

By the end of this chapter you will be able to:

- Define the term 'management' and identify how the key functions of training management relate to the definition
- Identify which of the key functions of management are important for your current role and rate your level of competence in each key area
- Seek constructive feedback to enable you to build a realistic action plan for your self-development

What are the essential functions of training management?

Before we explore in-depth what it means to be an effective training manager we will first spend a little time exploring what it means to be an effective manager in general. Training cannot be separated from the rest of your organizations business. So in order to impress as a training manager you will need to demonstrate the same all-round skills as your colleagues in all other departments.

How do I define the term 'management'?

There are many definitions of the term 'management' in current use.

Start this chapter by writing down the words or short phrases that you feel contribute to a meaning of what management is about. Write your ideas in the space below:

1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________
5. ________________________________
6. ________________________________
7. ________________________________
8. ________________________________
9. ________________________________
10. ________________________________

Take a minute to review your list. It will come as no surprise if you come up with a list of management activities that will include areas such as: planning, organizing, co-ordinating, controlling, motivating, delegating, coaching, training, problem-solving, disciplining.

Congratulations. What you have identified are many of the ingredients that go to define what a 'manager' does.

What you must retain sight of, if you wish to be successful managers (regardless of whether you are managing a training department, a railway station, a bank or even your whole organization), lies in the answer to the question '**SO WHAT?**'

Why do managers do all of these activities? What are they trying to achieve?

Management – A definition

'Management is the ***efficient, effective and economic*** *use of resources to achieve results with and through the efforts of other people.'*

A manager is responsible for the results of their work unit. Managers however, differ from other professionals and specialists. For the manager results are paramount. An architect may be able to demonstrate professional expertise in how well they've drawn up a set of drawings to meet industry standards but it is usually down to the effectiveness of managerial skills to ensure the building is completed successfully.

People and resources

Some individuals feel that this definition of management doesn't apply to them. Even in jobs where we work mainly on our own we are usually sitting in a middle of a web of people networks. In order for us to achieve our results we have to work with and influence a variety of people around us.

Following are two short exercises which will show how complex a role training management is.

Take a few minutes to draw two 'spider-diagrams':

- Diagram A – the typical range of 'people' that you have to work with or influence in order to get your job done as a Training Manager. By 'people' I want you to record their titles or descriptions rather than individuals, i.e. 'Accounts Manager' not "Jeremy"
- Diagram B – the typical range of resources that you have to control or manipulate in order to get your job done.

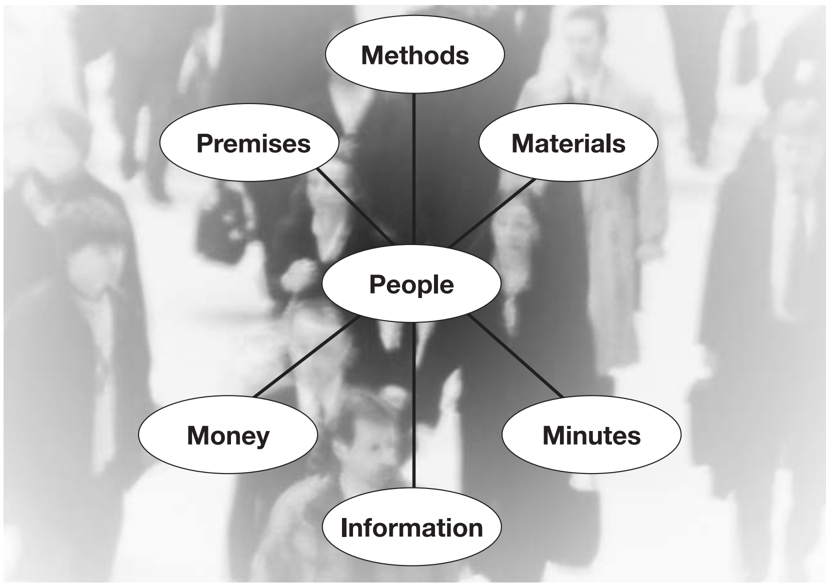
Review diagram – A

When you have finished review your diagram. Depending on the job you've chosen you should demonstrate that, even without direct staff, your role requires you to achieve results through a wide variety of people.

Review diagram – B

Again you will probably have a range of suggestions based on the roles in which you are involved.

Look at our example: 'Key management resources'



Key management resources

These have classically been viewed as the typical resources available to a manager.

Premises: The factory, shop or office premises you work in.

Materials: Any raw materials they use in their production process, for example paper, coal, cloth etc.

Machinery: Any equipment they use to turn materials into finished product, e.g. photocopy machine, overhead projector system.

Information: Often the lifeblood of the modern work environment. Stored on disc or paper, information helps you make decisions that affect your customers.

Minutes: How much time do you devote each day to achieve your key priorities? Remember, 'tide and time wait for no man.'

Money: Cash flows, budgets, cost codes. All organizations need to keep an eye on their costs if they want to survive and prosper.

Methods: How we do things around here. Your organization's standard operating procedures developed within your organization or insisted upon by a regulatory authority.

People: As we have demonstrated, in any job you have numerous points of contact with other people who are essential to assisting you in getting your job done.

'People' are in the center because they link back to our definition of management. People are an organizations key resource. Organizations cannot function without people. They are often the most costly resource and have the ability to utilize the other resources effectively or ineffectively.

As a training manager you fulfill a central role in any organization – ensuring that staff are adequately trained not only to do their current role but to be able to anticipate, respond and even initiate changes in the future development of your organization.

Revisit the resources you identified earlier. Does your training department manage any additions to your initial list?

Key management functions

A frequent analogy used to describe a manager is that of a juggler. To make sense of what's involved Henri Fayol identified the key functions of management which are discussed in detail in his book published in 1917, *Administration industrielle et générale*. It was published in English as *General and Industrial Management* in 1949 and is widely considered a foundational work in classical management theory.

Mastering each of these functions will help ensure you achieve your results as well as developing confidence and competence as a manager.

These key management functions are represented on our management wheel.

The management wheel

Planning: Setting corporate objectives and establishing plans to achieve these objectives.

Organizing: Initiating steps to put your plans into action.

Directing: Helping your workforce to perform in the key areas in order to achieve the organizational objectives.

Controlling: Maintaining performance levels through monitoring and evaluation and taking steps to rectify sub-standard performance.

Reviewing: Reflecting on individual and organizational strengths and weaknesses.

Communicating: Two-way exchange of information, either face-to-face, in groups or in writing on topics related to your plans, progress and overcoming problems or blockages.

As you can see from the following list each key function includes a number of key elements.

Major management activities defined

Planning

Setting corporate objectives and establishing plans to achieve those objectives. This involves:

- Awareness of management role – knowing what's expected from, and the functions of, a manager.
- Future orientation – originating a mission statement, key result areas and objectives.
- Planning techniques – scheduling activities to achieve objectives.

Organizing

Initiating steps to put plans into action:

- Decision-making – making a judgement about courses of action.
- Managing time and delegation – identifying priority tasks and who will tackle them.
- Recruiting and selecting – establishing and choosing the best person for the job.
- Training and development – equipping individuals with the skills to carry out the work.

Directing

Helping the workforce perform to achieve the objectives:

- Leadership – inspiring others to follow your direction.
- Motivating – promoting the active desire to achieve objectives.
- Giving feedback – encouraging performance by providing constructive information.
- Assertiveness – behaviour that establishes and elicits respect.

Communicating

Exchanging information with others about plans, progress and overcoming problems:

- Overcoming barriers by questioning and listening – clarifying and confirming information.
- Writing – express yourself clearly on paper.
- Managing meetings – working with a group to make decisions.

Controlling

Maintaining performance levels through monitoring and evaluation:

- Budgeting – plan and monitor expenditure needed to meet objectives.
- Problem-solving – taking action to correct an unfavourable trend.
- Appraising and disciplining – reviewing individuals contribution and taking appropriate action.

Reviewing

Reflecting on strengths and weaknesses:

- Customer care – being responsive to the needs of your customer.
- Managing change – identifying and initiating opportunities for improvements.
- Continuous professional development – committed to developing your own management skills and expertise.

Develop your training management skills

The first stage in any development process is to analyze where you are now. Having established a clear view of your current strengths and weaknesses you can then go on to make development plans, which take you towards where you want to be. To help you assess your current situation please complete the following **'self-assessment questionnaire.'**

Self-assessment questionnaire

Please complete the questionnaire about yourself in relation to your present job. The objective is to help you think about your strengths and weaknesses, and then use this analysis as a means of taking some self-development action.

When you have finished, we suggest you take the opportunity to discuss your findings with other members of your work group and use their views to input into your personal development plan.

How to complete the questionnaire

Read each item on the questionnaire. Ask yourself, 'How important is this activity to my current job?'

Alongside each item in the Importance column rate that item as either:

A – Very important

B – Some importance but not crucial

C – Little or no importance

In the Competence column using a scale from 1 – 5 give yourself the score which best describes your current level of skills, knowledge or ability:

1 – Outstanding ability in this area

2 – Significant strength

3 – About average

4 – Area of weakness that need improvement

5 – Poor, considerable need for improvement

Self-assessment questionnaire

HOW DO YOU RATE YOUR:	IMPORTANCE	COMPETENCE
PLANNING Awareness of management role Future orientation Planning techniques		
ORGANIZING Decision-making Managing time and delegation Recruiting and selecting Training and development		
DIRECTING Leadership Motivating Giving feedback Assertiveness		
COMMUNICATING Overcoming barriers by questioning and listening Writing Managing meetings		
CONTROLLING Budgeting Problem-solving Appraising and disciplining		
REVIEWING Customer care Managing change Continuous professional development		

When you have finished rating the questionnaire for both Importance and Competence review the completed form and select from the items at least one you have marked as A – examples of areas of strength (rated as 1 or 2) and at least one where they are weak(er) (rated as 4 or 5).

My major strength as a manager is:

____

My major weakness as a manager is:

____

Review the results

'O wad some Pow'r the giftie gie us
To see ourselves as others see us!
It wad frae mony a blunder free us,
And foolish notion.'

Robbie Burns, *To a Louse,* 1786.

The review process works best when you share your ratings with others who can provide you with a reality check and some constructive feedback. Don't just choose your close friend but pick a range of participants who can give challenging and objective views. These could be your colleagues, customers, consultants, team members, support staff or senior managers.

Ask them to each take a turn following the sequence outlined in the instructions below.

Review structure

Stage one: Disclosure

Talk through each of the activities you identified. Give the reasons you chose them and some examples of evidence that helped your reach your conclusions.

Stage two: Clarification

The members of your review group can now ask questions to enable them to clarify their understanding of your position.

Stage three: Reaction

The group members now respond with their reaction to your assessment. Their responses should cover:

- **Impact:** Their initial thoughts and feelings they had when listening to your review.
- **Challenging feedback:** They point out aspects of performance you seem to have overlooked, for example items where your self-assessment seems to be in error, or contradictions between different aspects.
- **Positive feedback:** They next confirm areas of your self-review and point out strengths you may have overlooked or played down.

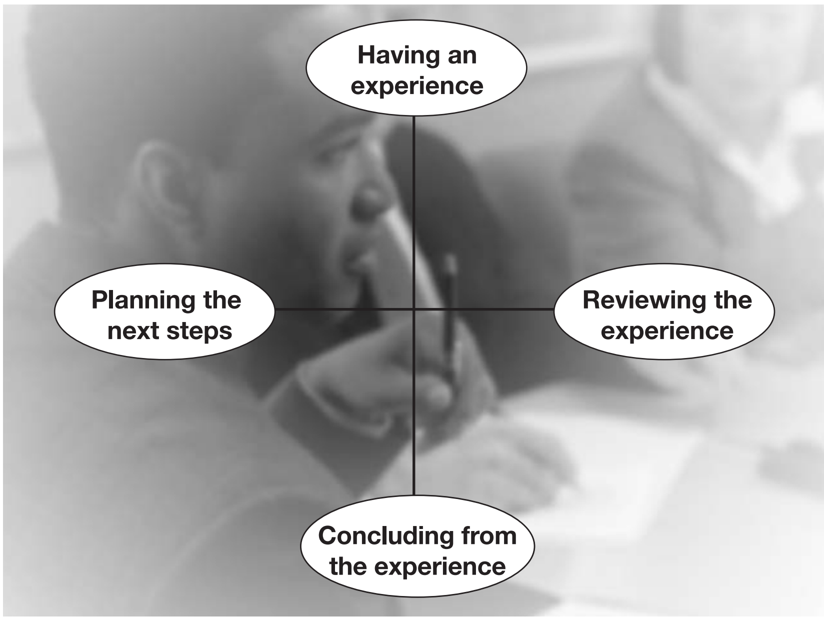
Stage four: Proposal

The group members now make suggestions and recommendations of how you can develop, maintain or improve your performance for the future in the key areas discussed.

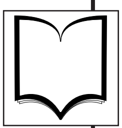
Following your direct participation in the Disclosure and Clarification Stages you will gain most if you simply absorb the feedback. We suggest that you take notes of the comments and suspend judgement on any future action until later.

The learning cycle

Planning personal and organizational development involves going around the well-established learning cycle.



The learning cycle



(Adapted from *The Manual of Learning Styles*, Honey & Mumford, 1992.)

Having had the experience of both self-assessment and constructive feedback from others you need to complete the learning cycle by completing an action plan that should ensure that you will take the appropriate steps to develop in the key areas you have identified. This final step involves you in identifying the possible actions you could take to help achieve what you are aiming for.

Action planning checklist

Work through the following points, making notes in the space provided of the preferred actions you have decided to take:

1. What am I going to do?

2. Which steps do I need to take?

3. How am I going to start?

4. When am I going to start?

5. How will I achieve it?

6. Who will be affected?

7. What could prevent me?

8. How will I know when I've succeeded?

Chapter two

The training function and organizational strategy

Introduction

By the end of this chapter you will be able to:

- Define and write a mission statement and key result areas for your training department
- Describe the purpose of your job and use the 80/20 rule to list the key result areas for yourself and key members of your team
- Recognize effectively worded objectives and write sample SMARTER objectives for yourself and your training team

Mission and key areas

Mission

No job exists in a vacuum. All organizations exist to achieve a purpose. The purpose may be complex and involve things that are in conflict with one another, e.g. giving service whilst being cost-effective and maintaining quality or safety standards.

The overall purpose of an organization can usefully be stated in a short paragraph, called the Mission Statement. For example:

'To provide building maintenance services for government buildings which satisfy client needs at lower cost and with minimal disruption, whilst meeting all regulations and agreed standards of workmanship/safety; and, in so doing, achieve budgeted revenue and profit targets.'

We should know the mission of our overall organization. Failure to do so means wasted time and effort.

Activity point

Do you know your organization's mission statement? Write it in the space provided

Mission statement – 1

The classic shape of many organizations is similar to a hierarchy. Each division should contribute to the overall aims of the organization. Within each division every department and section should contribute to the overall aims. They should clearly be able to identify how their own departmental mission statement fits into that of the overall organization.

Example training department mission statement:

'To provide a training and consultancy service for the organization's profit centres which provides a value for money service that fully satisfies the clients needs for quality at the lowest cost, whilst meeting our forecast budget targets.'

Activity point

Identify your training department's purpose. If you already have an agreed mission statement write it in the space provided.

Our training department's mission statement

If you haven't yet developed a mission statement then now is a good time. Treat the entry above as a first draft and circulate it to some of the key players within your organization.

Lead a critical review of what's on offer before jointly deciding on the most appropriate form of wording for your training department.

Our training department's mission statement
– fully agreed version: Mission statement – 2

Identifying the Key Result Areas

The mission statement is a broad-brush approach that states in general terms what you are setting out to do in your training department. We next need to identify how you can achieve it. This will involve performing well in certain key areas. A Key Result Area (KRA) is one where performance has a critical effect on achieving the mission statement.

Your training section may well be asked to perform a wide variety of different tasks but the KRAs are the ones on which you are judged. Achieve or surpass them and you are considered a success. Fall short and you are deemed a failure. KRAs must emphasize outputs, not inputs. An activity is not a KRA just because we 'do a lot of it' (e.g. attending meetings) but because it has a major influence on the achievement of our department's main aims.

A

Activity point

To identify your training departments KRAs we suggest you review the following steps:

Step one

Write down all the tasks that you and your team currently undertake. Don't worry about any order at this stage, simple note them down.

Step two

Stand back and review the list. Ask yourself the question 'Does this activity contribute towards us achieving the overall purpose of our training department (Mission statement 2) and the whole organization (Mission statement 1)?' Delete any items that don't make that contribution.

Step three

Write a list of the KRAs for your section. Many large organizations may have ten or more, smaller units will usually have between six and eight.

The following example provides an illustration of a typical training departments KRAs.

Key result areas of a typical training department

1. Provide guidelines on commissioning external training.
2. Maintain a database of approved training providers.
3. Set up and manage the core internal training programme.
4. Draft memos for senior management on the training and development implications of organisation-wide policy initiatives.
5. Devise and develop measures for evaluating the quality of training.
6. Publish a monthly report on the take-up of training against budget for each division in the organization.
7. Provide a hot-line telephone support service for managers involved in local training initiatives.
8. Ensure the organization achieves the 'Investors in People' standard by the end of this financial year.

A

Activity point

List below those activities that make a real impact to the overall success of your training department and the organization:

1. ____________________

2. ____________________

3. ____________________

4. ____________________

5. ____________________

6. ____________________

7. ____________________

8. ____________________

9. ____________________

10. ____________________

Establishing personal objectives

Having established the key areas for performance of your training department your next task is to establish personal objectives for everyone in your training team.

Any organization is only as good as the sum of its parts. Just as each department should know where it fits in to the wider picture then ever team member should have a clear focus on the purpose of their job. If each person in your training team knows what they have to achieve then there is a much better chance that the organization as a whole will achieve the results that are expected.

"If you don't know where you are going you will probably end up somewhere else!"

Robert Mager, *Preparing Objectives for Programmed Instruction,* 1962.

What am I here for?

Focusing for success

The first stage in the process of establishing their purpose is that they need to be able to give the answer to the question 'What am I here for?'

They should be able to express, in one or two sentences, why their job exists and what distinct contribution it makes to enable the organization to achieve its purpose. Tell them to think of their job as an important piece in the organizational jigsaw. The purpose will provide the answer to both the questions 'What?' and 'So what?' Following is an example of the job purpose of a management trainer:

Job purpose: Management trainer

'To run profitable training courses which give participants the opportunity to develop the knowledge skills and attitudes which will enable them to be more effective in achieving their work goals.'

A

Action point

Use the space below to write either your own job purpose or that of one of your key members of staff. You should aim for a summary of between 15 and 30 words.

Job title: ____

____

Job purpose: ____

____

Make sure that not only are the statements clear and unambiguous, but that they also show the 'why', behind their job.

It is quite common for people to express their job in terms of 'inputs' – the type and amount of resources used to produce work – but the reason we are employed is better measured by our 'outputs' – the amount of work produced, our end result.

Keep asking the questions: 'So what?', 'In order to achieve what?', 'What will the end result be?' – until you have a clear focus on what the chosen job contributes to the overall purpose of the organization as indicated in the mission statement.

Now we know where they are going we can assist them by providing a focus for their efforts and resources to achieving this aim.

What are your key activities?

In order to achieve your purpose you need to manage yourself efficiently and effectively. Not all the activities you carry out in a job have an equal effect on achieving that purpose. Each individual job holder needs to focus on their Key Result Areas (KRAs). Each KRA is an important part of the job that makes a significant impact on achieving its overall purpose.

One way of identifying these is by applying the 80/20 rule, which proposes that 80% of our results can generally be attributed to 20% of our efforts. This is sometimes called the Pareto Principle after the Italian economist Vilfredo Pareto, who observed that 80% of income in Italy was received by 20% of the Italian population.

The assumption is that most of the results in any situation are determined by a small number of actions:

- 80% of sales come from 20% of your customers
- 80% of sales (and profits) come from 20% of your products
- 80% of your production volume is for 20% of your product models
- 80% of your problems are from 20% of your customers, products, processes, etc
- 80% of a typical charity's revenue will come from 20% of its donors
- 20% of books account for 80% of the loans in a library
- 80% of expected results will come from 20% of the total effort

In other words, your critical 80% is the segment that contains the vast majority of what you seek.

Action point

Examples of the 80/20 rule that apply in our business are:

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ______________________________

KRAs should cover the main features of the job and are relatively stable over time. They should line up with the overall purpose of the organization and those of the training department. Failure on their part would adversely affect the overall team performance. The main areas should be defined in broad terms.

It is normally possible to identify between five and eight main areas of responsibility where they will make a significant contribution to the overall priorities agreed by their training manager.

If the number of KRAs moves into double figures the range of main responsibilities is too high. It will become difficult for the job holder to establish priorities in dealing with their time and achieving what may often be conflicting objectives.

In our next example we provide some details of typical KRAs of a management trainer.

KRAs of a management trainer

- Deliver effective training events which improve the management skills and knowledge of all the participants.
- Research and design new courses and ensure they are commercially viable.
- Update existing materials to ensure they are accurate, credible and continue to meet the needs of the organization.
- Carry out training needs analyses and evaluate courses to ensure they meet business needs.
- Manage the training office support staff to ensure events are effectively administered, fully equipped, run on time and meet budgeted financial targets.
- Market the services of the training department to internal and external customers to secure new and repeat business.

Activity point

Use the space below to rate a job of your choice and identify their KRAs. We are not after a full, detailed job description. This is simply a structured approach to help you both identify the priorities in their jobs for the year ahead.

Job title: ______________________________

KRAs

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ____

6. ____

Performance standards and objectives

The next step involves deciding what the job holder needs to achieve in each key area. They need to ask the question, *'How will I be able to measure that I am being successful in my job?'*

What you are after are observable or quantifiable results that relate the impact of the activity to the overall purpose of their job.

Performance standards are about:

- The quantity of output a job holder has to produce.
- The quality of the desired outcome or the way tasks were achieved.
- The deadlines by which you have to produce the desired outcome.
- The cost of achieving the outcome, e.g. the budget that you have to work within.

What is an objective?

A popular definition of an objective is:

'A specific end result to be achieved within a stated timeframe to a pre-determined level of quality and quantity.'

With this definition in mind review this example typical objective:

'Reduce the delay in the submission of management reports and minutes of cost control meetings.'

You can probably see this example is:

- Too vague
- Woolly
- Not specific
- Provides no timeframe for the activity
- Difficult for the training manager or job holder to measure success.

Now look at our redraft:

'Ensure that all departmental managers on the circulation list receive their management reports by the 21st of each month and minutes of cost control meetings are distributed within 3 days of each meeting.'

Our restatement should:

- Give a clear sense of direction for the job holder
- Focus their attention
- Provide clarity about the task to be carried out
- Provide a standard for measuring progress
- Aid their time management and prioritizing
- Give a basis for planning action.

How are objectives set?

The key factors to take into consideration when setting objectives with individuals in your training team are:

- What needs to be achieved (in the next 12 months)?
- What is it reasonable to expect from this particular job holder (take into consideration their length of service, experience, training, qualifications etc)?
- How can we improve our procedures or working methods?
- What action can we take to overcome aspects of the work which perennially cause difficulties?
- How can we express these as specific objectives?

What are the properties of an effective objective?

Effective objectives should have the following properties – summed up in our SMARTER mnemonic:

S – Specific

Clear and unambiguous end product. The individual must know precisely what they have to do to achieve the objective.

M – Measurable
Observable outcomes of performance (quantity, quality, cost, time). Where quality is the only real factor assessability may be more relevant than measurability.

A – Achievable
Whilst they should be challenging and encourage growth they need to take into account the individuals experience, capabilities and normal working hours.

R – Relevant
Address a significant need of the organization. They should be essential for the overall improvement of the department and the individual.

T – Timebound
You have agreed timescales or turnaround times for completion. Now is an opportune time to undertake the project.

E – Exciting
Project will stimulate action. This may be difficult with routine tasks, so what will motivate them to do a good job?

R – Recorded
Written down for clarity, communication and review. You will both benefit from having as audit trail of what has been agreed.

We have provided an example of an objective for a training administrator.

Training administrator: Objective and performance standards

Objective one
To assist the training manager run efficient and cost conscious training courses by ensuring that for each training event:

- Every participant has all the relevant call-up papers at least one week before the course begins.
- The training room and facilities are prepared 1 hour before the event and are maintained to an acceptable standard during the event for both the tutor and participants.

- The caterers have been informed of requirements in writing 24 hours in advance.
- Records of courses (attendance list, participants evaluation forms and tutors summary sheets etc) are accurate and up to date and are passed to the training manager within two days of the course closure.
- Invoices for participants and from consultants and caterers are correct and are passed for payment within two days of receipt.

A

Activity point

Write a personal objective.

____

____

Here is your opportunity to draft a sample objective and standards of performance for a member of your training team:

Team member: ______________________________

Objective: ________________________________

Performance standards:

1. ______________________________________
2. ______________________________________
3. ______________________________________
4. ______________________________________
5. ______________________________________
6. ______________________________________

What you have constructed is a blueprint for effective management. By identifying what they should be doing and how, both you and the job holder will recognize if they are off track. Members of your training team can now focus their efforts on making sure they are managing their resources efficiently and effectively to achieve the desired results.

Checklist

The underlying principles of this chapter are that:

- ✓ A manager's primary function is to plan, organize and control staff and other resources in order to achieve results.
- ✓ Whether or not there is a formal objective setting system in their organization training managers should produce objectives for their own area of responsibility.
- ✓ These objectives should relate to the priorities identified by the organization as a whole and reflect the commitment made in its mission statement.
- ✓ In any job there are a few key areas of work where good performance is required to make the maximum contribution to both team and the organization's success.
- ✓ If all are to work effectively to achieve the team and organization purpose it is essential you know exactly what level of performance you are aiming for – your objectives and standards.
- ✓ Effective objectives comply with our SMARTER format.

Chapter three

Training and the wider environment

Introduction

By the end of this chapter you will be able to:

- Identify the stimuli that kick-start the training process
- Apply two popular methods (PESTLE and SWOT) for analyzing your current situation and identifying your stakeholders
- Identify the direction of your training department and express them as SMARTER objectives
- Develop a force field analysis to help you identify any problems with implementing your desired objectives
- Prepare to implement an action plan incorporating classic strategies for overcoming resistance to change

'We are living in…a roaring current that overturns institutions, shifts our values and shrivels our lives.'

Alvin Toffler, *Future Shock* 1970, Bantam Books

Many people today are faced with a bewildering complexity of change. Whether talking about global warming, changing political structures and affiliations, or the need for lean flexible organizations to meet business challenges we are all familiar with the idea of 'change'.

Change takes place at a variety of levels: organizational, cultural, personal and societal. All these changes, whether they be to learn how to operate new computer equipment, learn a language or manipulate a spreadsheet means that we will, throughout our personal and organizational life, have a training need.

Why do we train?

Fundamentally, training takes place in order to satisfy a training need. These could arise as a result of present requirements concerning problems, challenges, or new and pressing developments. They could also be connected with future requirements under similar headings.

The associated training needs could be related to one or more of the following stimuli:

- Creative – training for an entirely new way of operating
- Innovative – training to develop and extend an existing system.

- Preventive – maintenance, before things go wrong.
- Curative – after things have gone wrong!
- Fire fighting – fixing things as they are happening.

Training managers have always been involved with maintaining systems and performance to achieve results. Increasingly it will also involve taking a proactive role to enable your organization to change and develop in ways that will contribute to its future success.

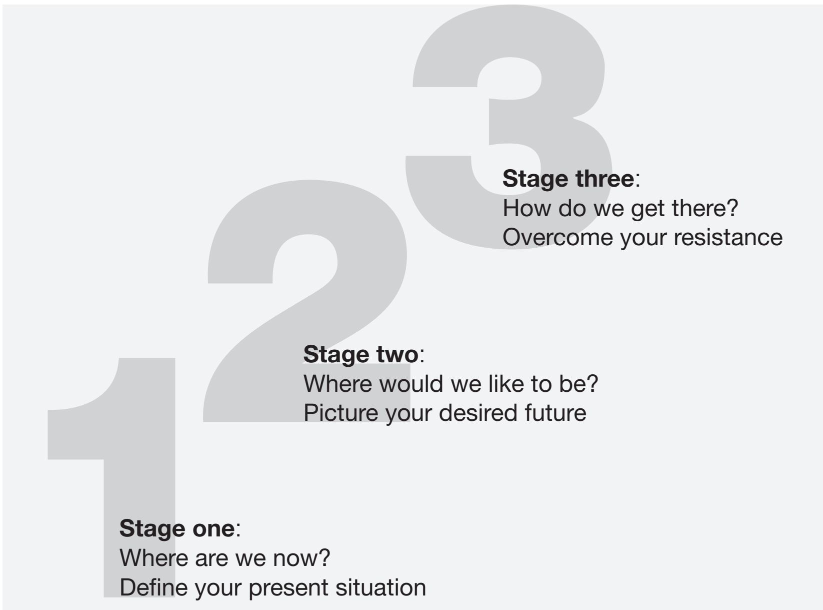
The need to develop new skills, knowledge and attitudes is stimulated by the rapid rate of change that individuals and organizations have been going through over the last few decades.

Many of the current *Fortune 500* didn't exist in the 1950s. Their products or services were figments of the imagination of science fiction writers or only available to the select few.

We know from history that change and advancement have been a continuous process but that the rate of change is increasing so rapidly that future developments are likely to become less and less predictable. It is fortunate that the skills needed to handle change effectively are not new or complex. To a large extent they are part of most managers everyday activities and they have already developed a repertoire of change skills.

An overview of the change process

This three-stage process will help you focus on the task in hand and help you produce an effective action plan for the future.



The change process

Stage one – Where are we now?

One of the first steps that a training manager will need to develop is awareness of our current environment. Without remaining alert you will be taken by surprise, overtaken by trends and vulnerable to changes in people and circumstances.

There are a wealth of cases that illustrate the failure of individuals, organizations and societies that failed to maintain their awareness.

- *Belshazzar feasting while the Persians tunnelled into his Kingdom.*
- *IBM concentrating on mainframe computers and ignoring the move to laptop and personal computers.*
- *Hitler ignoring advice and history by invading Russia in winter.*
- *The Nixon administration acting as though the American public had no interest in the morals of their leadership.*

Failure to develop and maintain a high degree of awareness will leave individuals and organizations vulnerable to change.

Ideas to develop awareness

Read – analyze the press, particularly quality dailies, weeklies and professional trade journals.

Talk – seek opportunities to discuss views and opinions about ‘the way things are’. Use the Internet, attend conferences, and join your local chamber of commerce and branch of your professional body.

Listen – one of our major failings is that we jump to conclusions too quickly. Suspend judgement, try to accurately summarize and paraphrase ideas. Try listening for what’s behind the message in political statements etc.

Reflect – spend time reviewing your data. Too often in the modern business world we are pressurized to do rather than sit and think.

Analyze your developement

No organization exists in a vacuum. Trends in the wider world affect our organization and will ultimately affect what we are trying to achieve as project managers.

PESTLE analysis is a popular method of examining the many different external factors affecting an organization. The acronym PESTLE stands for the following:

Political

The current and potential influences from political pressures.

Economic

The local, national and world economy impact.

Sociological

The ways in which changes in society affect your organization.

Technological

The effect of new and emerging technology.

Legal

The effect of national and world legislation.

Environmental

The local, national and world environmental issues.

A

Activity point

Take a few minutes to consider the environment within which your organization and training department are operating. Make notes on the following:

P = Political

E = Economic

S = Social

T = Technological

L = Legal

E = Environmental

Who are my stakeholders?

A PESTLE analysis is an excellent way of identifying your stakeholders.

There are many stakeholders who can determine your working environment. Stakeholder theory is an approach to business that widens the view that a firm is responsible only to its owners. Instead it includes other interested groups such as employees, customers suppliers and the wider community, which could for example be influenced by environmental issues. These can include:

- The sponsor of the training department (sometimes called the client, customer, owner or funder)
- Other senior managers in the organization
- Suppliers, contractors, or vendors
- Professionals, craftspeople and other specialists who serve on the training team
- The training manager themselves
- Government agencies (local and central government) who regulate the training department's processes or deliverables
- The workforce who will use or be affected by the training departments outputs
- Special interest groups (charities, business associations, pressure groups) who also have an interest in the work and output of the training department

It us important to identify and involve all stakeholders so that to the best if your ability you can take steps to make sure that everyone's expectations may be met. The last thing you want is to find out that a major stakeholder has been overlooked and is subsequently demanding that the training programmes be changed.

Prioritize your stakeholders

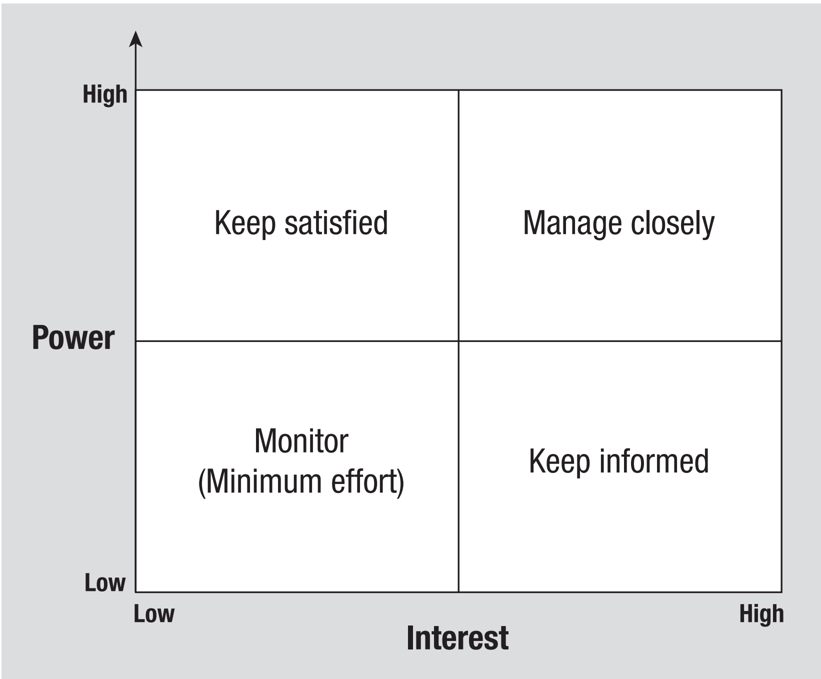
You may now have a long list of people and organizations that are affected by your work. Some of these may have the power either to block or advance. Some may be interested in what you are doing, others may not care. Map out your stakeholders using a Power/Interest Grid and classify them by their power over your work and by their interest in your work. Their position on the grid shows you the actions you have to take with them:

- **High power, interested people:** these are the people you must fully engage and make the greatest efforts to satisfy.
- **High power, less interested people:** put enough work in with these people to keep them satisfied, but not so much that they become bored with your message.
- **Low power, interested people:** keep these people adequately informed and talk to them to ensure that no major issues are arising. These people can often be very helpful with the detail of your project.
- **Low power, less interested people:** again, monitor these people, but do not bore them with excessive communication.

A

Activity point

Identify and plot your key stakeholders into the following grid:



Stakeholder analysis

Here are some tips for managing your stakeholders:

Keep them informed

Good communication helps solve problems, keeps the stakeholders informed and warns of possible problems. (See following guidelines for developing your communications plan.)

Understand their needs

Understand the requirements of the stakeholders and make sure they are met. Solutions to problems that are of no interest to them waste time and do not give any satisfaction.

Openness

Be honest with the stakeholders and develop a relationship that encourages them to be honest. Good communications help.

State your needs

Let the stakeholders know what your needs are and how they can be met.

Involvement

Try, if practical, to let them be part of the team. Involve them in planning and team meetings. This encourages a sense of ownership and an improved understanding of the training department.

Negotiate

Agreements with your stakeholders should be by negotiation to the satisfaction of all concerned. Both parties should walk away from the negotiating table convinced they have a good deal.

Guidelines for developing your communications plan

Step 1

Assemble the following:

- List of stakeholders and their roles, responsibilities and physical locations.
- Any descriptions of communication requirements or related assumptions among stakeholders.
- Information about external reporting requirements. What do the public, the press, the government, and other outsiders

need to know about the training department? How will they find out?

- Information about technology available to support communication with the department (e.g. fax, e-mail, voice mail, messenger, postal service, radio).
- Information about typical communications methods for the industry or in your organization.

Step 2

What kind of information does each stakeholder need?

- List of information needed by each stakeholder.
- Typical information needed by stakeholders in similar departments.

Step 3

What methods/technologies will provide all information needed by stakeholders without wasting resources on providing unneeded information or using inappropriate technology?

- List of appropriate communications methods and technologies.

Step 4

Create a training department communications plan that includes information about:

- Collection structure – How and by whom will information be gathered, what information will be gathered, and from whom?
- Distribution structure – To whom will information flow, and by what methods?
- Description of each type of information to be disseminated – What format, content, level of detail, conventions/definitions will be used?
- Schedules listing when each type of information will be produced.
- A method for updating the communications plan in the future.

A

Action point

Take some time to develop a plan for communicating with your training departments stakeholders.

Stage two – Where would we like to be?

SWOT analysis

The second popular tool for analyzing the current state of your training department is SWOT analysis. This originally stated out as a military tool for analyzing battle situations but is now used in a wide variety of circumstances. If PESTLE looks at the outside environment than SWOT looks at the impact of that changing world on your training department.

SWOT stands for:

- **Strengths**: identify the positive features and people in your training department.
- **Weaknesses**: problems and limitations you have, things that your people can't do.
- **Opportunities**: ways of exploiting strengths; developments you can take advantage of.
- **Threats**: problems caused by your weaknesses, threats from external forces identified in the PESTLE analysis.

Example SWOT analysis

Strengths: What have you got going for you? Identify the particular strengths that your training team or wider organization can bring to the work. For example:

- Organization known for developing innovative training solutions that match customer's business needs.
- Previous experience of team members in staffing exhibitions.
- First class knowledge, throughout the organization, of visual display techniques and equipment.
- A well-stocked photograph library showing tutors in action on outdoor adventure courses.
- In-house despatch service equipped to handle movements of materials to site by due date.

Weaknesses: What factors within your organization may hinder your success. It is also useful to identify any constraints you may be working with. For example:

- Staffing implications of having the exhibition at one of the organizations seasonal peak demands.
- A limited budget that will reduce the size of stand and type of activity used, i.e. no room for popular rope-slide exercise.
- Deadline of 12th July for confirmed entries will mean team has to get up to speed quickly.
- No experience of stand or exhibition brochure design within existing team.

Opportunities: What opportunities may be presented by the training event. Try to identify some of the benefits you will gain from completing the project. For example:

- Directly increase sales and make a profit.
- Chance to meet the new customers attending the event.
- Opportunity to meet old/existing customers and introduce them to new products.
- Chance to impress your customers in comparison with your competitors.

- Opportunity for your staff to develop skills in new areas, i.e. project management, exhibition sales techniques, stand design.
- Will unite and focus the team, giving them a common development opportunity.

Threats: These are the factors that exist in the wider environment over which the training team may have very little influence. For example:

- Although deadline is some way off all places may have been allocated.
- As a new entrant you will come well down the pecking order for sites. You may end up in a cul-de-sac or the annexe!
- Poor promotion by the exhibition organizers may mean low attendance by new prospects.
- Does it clash with any other popular events?
- Competitors' presence and stands could have greater impact than yours.
- Competitors will see your new ideas and may pinch them for themselves.
- Your existing customers may not attend.

A

Activity point

Your training department's SWOT

Here are some useful questions to ask yourself as you compile a SWOT analysis for your training department.

Strengths

- What are we good at?
- What do we do best?
- What are our assets – finance, equipment, people and location? Reputation, position in the industry?
- How do these compare with others?

Weaknesses

- What do we do less well?

- What do we do badly?
- What do we not do at all?
- Where do our competitor's assets surpass our own?
- Where else are we weak?

Opportunities

- What changes do we expect to see over the next 12 months that will present us with opportunities?
- What changes over the next 5 years will present us with opportunities?
- What long-term changes may present us with opportunities?

Threats

- What do other people have that is better than we have?
- Where are other people strong and we are weak?
- How easily can others enter our market?
- What changes in the external environment may cause a threat?

Picture the desired future

The next step is to turn your attention to the future.

"Would you tell me please which way I ought to go from here?"

"that depends a good deal on where you want to get to," said the cat.

"I don't much care where," said alice.

"Then it doesn't matter which way you go," said the cat.

"So long as I get somewhere" Alice added as an afterthought.

Alice's Adventures in Wonderland, Louis Carroll, 1865

Vision and the ability to communicate a clear sense of direction are two of the most important aspects of effective management. Without this you and your training team will be drifting like a boat without a rudder. In order to know where you are going you must develop a statement that creates a unity of purpose. This statement will need to be backed up by concrete objectives that provide the specific end results to be achieved by your organization, team or members in it.

Set your direction

Having reviewed your PESTLE and SWOT analyses, what are the key objectives you want to set for your self and your training department?

Make sure that this objective follows the SMARTER approach to objective setting:

SMARTER = Characteristics of effective objectives

S – Specific

- Clear and unambiguous end product

M – Measurable

- Observable outcomes of performance – quantity, quality, cost, time

A – Achievable

- Realistic within the capabilities and constraints

R – Relevant

- Address a significant need of the organization

T – Timebound

- You have a target date for completion
- Now is an opportune time to undertake the project

E – Exciting

- A project that will stimulate action

R – Recorded

- Written down for clarity, communication and review

A

Activity point

Training Department's Key Objectives.

List below the key objectives of your training department:

1. ____________________

2. ____________________

3. ____________________

4. ____________________

5. ____________________

6. ____________________

Stage three – How do we get there?

How can we move forward to our ideal?

Having identified your specific objectives the next step is working out a strategy – what is the best way to get there – and agree our tactics – what actions should be taken by when and by whom?

As I'm sure you are aware, change in any organization can be a process fraught with difficulty. You can increase your chances of success by anticipating some of your potential obstacles. A useful tool for doing this is the force field analysis.

Force field analysis

This is a problem solving approach identified by a social scientist called Kurt Lewin. He suggests that we look at any situation as being held in equilibrium by two opposing sets of forces. Theses are:

- *Pushing forces – which are driving us to seek the change.*
- *Resisting forces – which are restraining us by acting as an obstacle to progress.*

Nothing will happen if the status quo is allowed to remain, in order to get movement and progress you will have to change the forces by:

- *Increasing the driving forces, and/or*
- *Decrease or divert the restraining forces.*

STAGE ONE: Force Field Analysis – identify the problems

A

Activity point

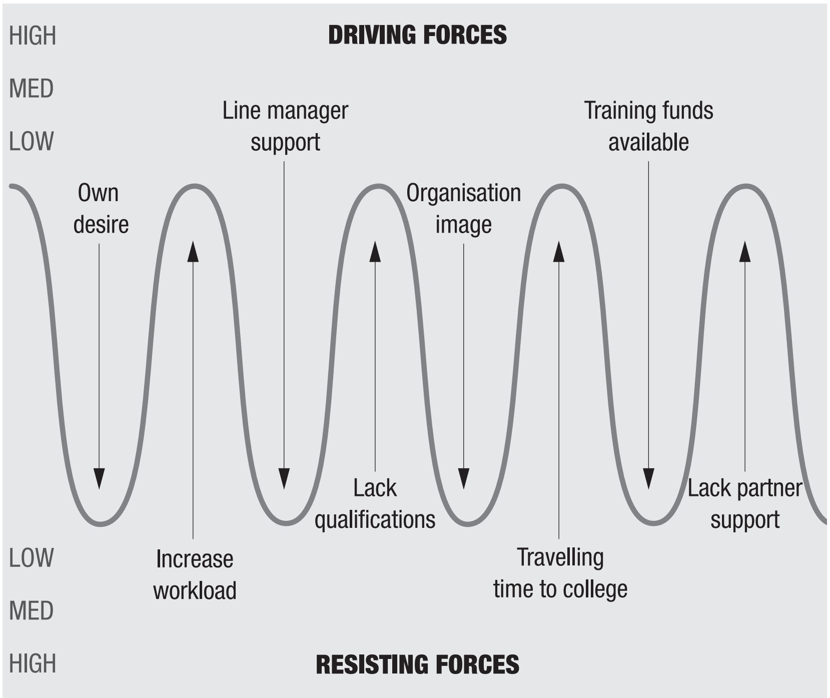
STEP 1: Write down your goal, what change do you want to happen?

STEP 2: Identify all the driving forces that will contribute to you achieving your goal.

STEP 3: Identify all the restraining forces working against what you want to achieve.

STEP 4: Rate the forces in order of importance to the success or hindrance to you achieving your goal. A = High B = Medium C = Low.

STEP 5: Diagram the forces using the length of the arrows to indicate the magnitude of the force. (See our example.)



Force Field Analysis

A

Action point

Stop and review

This will be a good point to stop and discuss your force field analysis with others. Do they agree? Can they identify additional pushing and resisting forces?

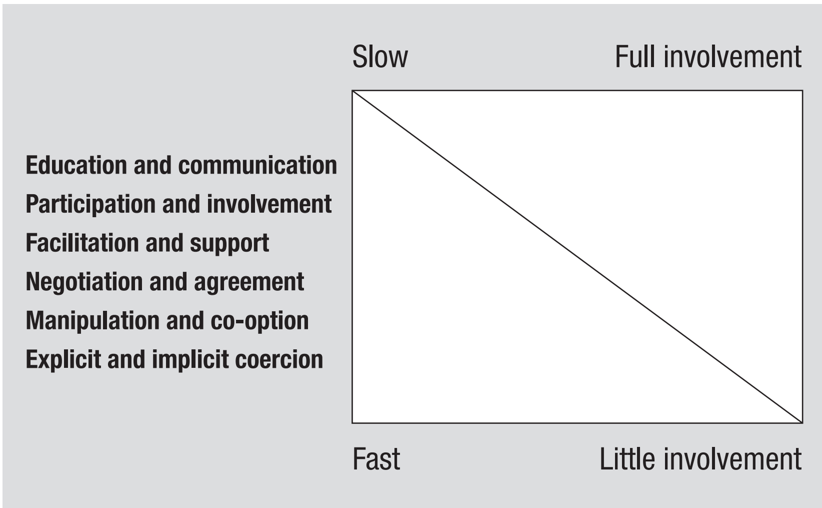
Prepare a strategy for change

Having reviewed your force field, one approach to removing resistance is simply to oppose it with more force. For example, management who wished to introduce new working methods and equipment could remove the old equipment and install the new machinery over the weekend or holidays.

This approach could, however, encourage direct resistance such as a strike, work to rule and refusal to operate the new machine or work a 'go-slow', increased sickness, absenteeism and other delaying tactics.

While an autocratic approach may be necessary in some circumstances it should not be taken as a first option until other strategies have been considered.

Strategies for change – a continuum



Strategies for change

These methods were identified by Kotter and Schlesinger (Harvard Business Review, 1980)

Choosing Strategies for Change, Kotter and Schlesinger (Harvard Business Review Vol. 57 No 2. 1980, pages 106-114) Reprinted by permission of Harvard Business Review.

All six can be used in any combination depending upon the situation in terms of the type of resistance and the nature of the change being implemented.

Education and communication

For

This approach can be used where there is a lack of information among the people being affected by the change. It can be very useful to overcome resistance caused through misunderstanding and, once persuaded, people will usually help wholeheartedly with the implementation of the change.

Against

It can however be very time consuming and expensive, particularly if there are lots of people involved.

Participation and involvement

For

This approach works well where the initiators do not have all the information they need to design and implement the change. It can combine the advantages of the first method by giving people a stake in the change. As they are implementing something they have been involved in designing participation and commitment are high.

Against

The problems associated with this approach are similar to the one above. It also needs an able and articulate workforce to make the participation effective.

Facilitation and support

For

This is most suitable where people are resisting because of problems of adjusting to the implications of the change. They will feel threatened and need counselling and support to come to terms with their fears and see that change can have a positive outcome.

Against

Among the problems often raised are that it again can be time-consuming and expensive as counselling and support work best one-on-one. The outcome is also far from predictable. Many people have such deep-rooted fears of change that they will still fail to come to terms with it.

Negotiation and agreement

For

This approach works best in an organization that has someone or a group of individuals who will clearly lose out from the change but who also have the power to block or considerably obstruct it's implementation. As with all effective negotiations it works best if both parties can reach a workable compromise they consider to be a 'win-win' outcome. Sometimes it is a relatively easy way to avoid major resistance and individuals usually fall in line with the collectively agreed line.

Against

The problems with this approach result from weak management who go for appeasement rather than strive for a difficult result. It may also set a precedent (negotiation is how we resolve issues) that may not be suitable or wanted on another issue.

Manipulation and co-option

For

This can be a very inexpensive and quick way of resolving resistance. It can easily backfire and increase resistance when people resent the manipulation, particularly when they have no face saving options to help them justify their choice both to themselves and others. The resistors can be tempted to change their views by offers of promotion, a company car or a secure job.

Against

It may however, reinforce a workforce's view that management are not to be trusted or if pressurized will always give in and give them an incentive to change.

Explicit and implicit coercion

For

This strategy should only be adopted when all else fails. It usually occurs when management cannot make concessions and need to make a quick and clean break with past practices.

Against

It will only work where you have the power to carry out your threats and are prepared (or have a contingency plan) to live with the other party, not only withdrawing co-operation but actually leaving the organization on-masse. Can you live with the consequences?

STEP TWO: Force Field Analysis – the action steps

When you are confident that you have identified all the forces move on to the action stage.

STEP 6: Prepare a strategy for changing the situation. Work on each important force and identify:

- action you could take to increase, strengthen or add to the key driving forces.

- action you could take to decrease, lessen or eliminate the key restraining forces.

STEP 7: Redraw your force field and assess how feasible your goal is now. Will your ideas be enough to shift from the balance or do you still need to identify new forces.

STEP 8: When you are convinced that you have identified a workable solution you need a plan of action that shows:

- What stages will occur in what sequence
- Target start and finish time
- Who will be responsible for what action
- What resources they will need
- Review dates to evaluate progress

What can we do next?

Change will take place on an organizational level if there is sufficient critical mass to give it some momentum. The fact that you have produced a plan will help this.

Three stages of change

These three stages have been credited to Professor Edgar Schein of Massachusetts Institute of Technology. He identified three stages that managers must get people to move through when they need to change in some way.

- ***UNFREEZING*** – Creating a motivation and readiness to change and letting go of old habits
- ***RESTRUCTURING*** – Helping people find a new point of view.
- ***REFREEZING*** – Helping people integrate the new viewpoint and form fresh habits.

Adapted from *Process Consultation,* Edgar Schein, 1987

The training manager as a role model

It is important that during any process of change you act as a good ambassador for both your training department and organization.

A

Activity point

List below the types of behaviours you think you should display and those you should avoid during this transition period:

Positive behaviour – **Use whenever possible**

Negative behaviour – **Avoid at all times**

Checklist

- ✓ Have your finger on the pulse in order to recognize and anticipate the stimuli associated with training.
- ✓ Develop your awareness of your current situation through reading, talking to others, listening and taking time to reflect on your observations.
- ✓ Update your organizations PESTLE analysis at least once every year.
- ✓ Identify your key stakeholders and develop a plan for communicating with them regularly.
- ✓ Conduct a SWOT analysis on your team at least once every year.
- ✓ Set your direction by writing and communicating SMARTER objectives to staff and stakeholders.
- ✓ Use the force field analysis to identify problems to achieving your objectives.
- ✓ Change will often be resisted. Use well established strategies to identify and overcome obstacles.
- ✓ Remember that as the training manager others will be looking to you as a role model. Be aware of what behaviours you should display (and what you should avoid) that are congruent to your position.

Blank

Chapter four

Training needs analysis

Introduction

By the end of this chapter you will be able to:

- Prepare and agree an investigation plan for the identification of current and future training needs at organization, departmental or workgroup level
- Select and use a range of information gathering methods so that training needs are reliably identified within time and costs constraints
- Apply a practical technique for the analysis of the information and data to identify needs and determine priorities
- Use a structured framework for the development and production of an outline plan to show the proposed training solution
- Seek informal and formal reaction via a written report and presentation to seek approval for the recommendations

Training needs analysis – in a nutshell

1. Scan for obstacles to achievement of objectives
2. Identify symptoms
3. Gather evidence
4. Analyze for human resource performance shortfall
5. Agree training needs with operating management

A systematic approach to training

To place the process of training needs identification in a wider context we will initially explore a popular model of the systematic approach to training. This has been used for many years to focus on the delivery of high quality training.

This approach brings an organized framework to what is essentially a dynamic and constantly fluid solution. It divides the training process into a number of separate areas. These are:

Recognize change forces

- Always present and invariably have training implications.
- Includes changes in staff and their performance, new methods and technology, altered systems and procedures, organizational development.

- People dislike change and its effect. Training has a role to help people deal with change and reduce its often feared negative effects.
- Without training change can fail to produce the desired results.

Identify training needs

- What are the training needs associated with successful change?
- Are the training needs described both in organizational and human terms?

Analyze job functions

- What competencies are people required to use in the job?
- What standards of performance demonstrate success?
- What groups of people are involved?
- How do these people and their jobs fit into the context of the organization?
- Do all the people involved have exactly the same training needs?

Define training objectives

- Write clear training objectives for each group of trainees.
- What are they required to do and to what standard?

Select trainees

- Review the group of people who may make up the trainees.
- Identify characteristics which may have an impact on the choice of methods.
- If learning thresholds must be set, establish nomination/selection procedures.

Design the training

- Identify the content.
- What do the trainees need to know and be able to do to achieve competence in the job?
- Map out an effective and balanced learning process.

- Put the information into a logical structure and sequence.
- What are the best methods and media available to support the required learning for the trainees?
- Where and when should learning experience take place?
- Who will assist the trainees to learn?

Facilitate the training

- Deliver the learning event.
- Develop the trainees to the required level of skill.
- Provide trainees with encouragement and feedback.

Measure outcomes

- Has the learning event met its stated objectives?
- Has the trainee transferred the learning to the workplace?
- Can the trainee now meet the requirements of their job?
- Has the trainee been given any required support in the workplace?
- Has the trainee been assessed as competent?
- Identify specific weak links – modify and update.

A

Activity point

Review this list of suggestions for the systematic approach:

- Are you familiar with all the steps?
- Are you competent to carry out each effectively?
- In which areas should you seek further advice and/or development?

Assessment of training needs

These should be:

- Carried out against a realistic statement of organization or departmental objectives.
- Start with an analysis of effectiveness in the organizations major work areas.
- Cover all levels of personnel.
- Identify where objectives are not being met or are at risk.
- Identify where lack of competence (skills or knowledge) prevents the achievement of business objectives.

What should a training needs analysis cover?

The process of identifying training needs can be quite daunting if you go too far or too deep. We need to be clear in our thinking as to what we are setting out to do and be able to explain that to others that may be expecting different outcomes from our work.

The depth to which we can investigate can be summed up by the training needs matrix below:

	Residual	Present	Future
Organisation			
Occupation			
Individual			

Training needs matrix

The matrix explained

Organizational needs

What general weaknesses of the whole or part of the organization affects the achievement of organizational objectives?

Occupational needs

What specific knowledge, skills and attitudes are required to perform the roles?

Individual needs

Performance in the job. This should not only focus on shortcomings but also new and changed responsibilities. (These are usually identified through performance appraisal and assessment systems.)

Residual needs

Needs which have existed for some time. (For example where systems have changed in the past with little or no training.) What skill deficiencies are unrecognized or under-funded?

Present needs

Barriers to achieving current organizational objectives.

Future needs

- Knowledge, skills and attitudes for impending/new tasks and objectives.
- Special predictable skills to implement change; change management skills.
- Skills which may be required if possible change occurs.

A

Activity point

Cast your mind back over your past career (both in current and past employers). Can you identify examples of all the types in our Matrix based on your past experience?

The following list may act as a memory-jogger to help you identify or recall your training needs under each of our headings:

Technical needs

Skills required to operate equipment or follow complex procedures or utilize computer software for performing existing or new tasks.

Culture change needs

New philosophies and styles of leadership. Continuous improvement techniques and skills or attitudes and behaviours for new quality approaches, internal customer awareness etc.

Soft Skills

Coaching subordinates for managers and supervisors. Appraisal interview process skills. Team working skills. Sales presentation and objection handling skills.

Trainer skills

Workplace trainer skills for craft/technician/office worker roles. Participative techniques for technical topics. Updating experienced trainers on advances in adult learning.

Getting the process started – how to identify that you have a need

A

Activity point

Use one of our sample checklists to help you identify if you may have a need. Does your organization have any of these symptoms?

Checklist – 50 symptoms of organizational problems

1. Customer complaints
2. Delays caused by errors and mistakes
3. Excessive time to finish jobs or supply parts
4. Low output
5. Excessive absenteeism or unpunctuality
6. Excess application for time off
7. High labour turnover
8. High accident frequency
9. Excessive maintenance costs

10. Bottlenecks in production
11. Slow paperwork and procedures
12. Errors from poorly worded instructions
13. Poor communications generally
14. Ignorance of safety rules
15. Failure to use safety equipment
16. Neglect of minor injuries
17. Untidy work areas
18. Ignorance of company rules
19. Inadequate information about company organization and policy
20. Excessive wear and tear on equipment
21. Difficulty in mastering new equipment
22. Slow progress at reaching threshold standard for quality and quantity for new employees
23. Lack of flexibility in workforce
24. Too much waste, scrap or work that needs to be re-done
25. Specifications not followed
26. Poor utilization of machines and equipment
27. Numerous disputes
28. Recruitment problems
29. Employees lack interest in their work
30. Errors caused by careless measuring
31. Quality standards not met
32. Failure to realize importance of minor jobs
33. Poor territory management
34. Inadequate leadership
35. Financial difficulties
36. Unclear individual roles
37. Ineffective (or no) delegation
38. Senior management commitment

39. Internal politics
40. Failure to meet legal requirements
41. Unclear operational objectives
42. Crisis management
43. Too much paperwork
44. Low staff morale
45. Outdated systems
46. Resistance to change
47. Industrial action, e.g. work to rule
48. Corporate planning orientated to systems rather than people
49. Users constantly change specifications during life of a project
50. Political influences have too high an effect on selection of trainees and control of budgets

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Alternative activity point

Apply our 20 questions to identifying if you have a need:

Training needs checklist

1. Is your business standing still or decreasing?
2. Does your business just maintain itself from day to day with no clear plan of where it is going in the next few years?
3. Are you thinking about expanding your business?
4. Do you need to capture more market share?
5. Are you loosing business to your competitors?
6. Are there changes occurring to the structure of your organization which are going to result in changes to job descriptions?
7. Are your sales teams failing to increase sales and acting as order takers rather than salesmen?
8. Would you like to turn more enquiries into orders?
9. Does the attitude and performance of some of your staff concern you?
10. Is the number of complaints from customers too high?

11. Do you have a high staff turnover or absenteeism or sickness rates?
12. Are some of your recent recruits having difficulty in demonstrating their potential?
13. Do some of your recent promotees struggle to achieve the competence needed for the higher grade?
14. Is there a lack of management planning, direction and control?
15. Are there communication problems between key people and key departments?
16. Would you have adequate cover if one of your key staff left or was on long term sick leave?
17. Do you seem to lurch from crisis to crisis time and time again?
18. Do your staff often complain about insufficient time to do their jobs?
19. Do you lose may of your 'high-fliers' to other organizations?
20. Do you have a high wastage/damage level?

If you have answered, 'yes' to five or more of these questions then training may well be the approach needed to solve your problems.

A model for action

The process of identifying training needs is always a significant project to undertake. It has to produce results and not stall because you can't measure all needs with scientific accuracy. We have produced a model for planning and control purposes. Applying our model will ensure that all the key stages are carried out. In this section we will introduce the model and explore it in more detail later.

The six step model for identifying training needs

1. **Organize and plan**
   - Identify the scope of the training needs identification study.
   - Set out the priorities, milestones and success criteria in your terms of reference document.
   - Set up a project plan for the training needs analysis study and be prepared to adjust it.
   - Gain agreement on what is expected of you.
   - Work out what actions are required, how long they should take and progress milestones.
2. **Collect the information**
   - Fact-finding for training needs identification using a variety of methods
   - Identify symptoms and problems caused through a disciplined structured survey.
   - Liaise, obtain commitment from operational and/or line managers who own the needs. Get out and about. Do not treat as desk research only.
   - Encourage and develop cooperation and trust.
   - Gain support and commitment through active involvement of line managers.
3. **Determine the problems and their priorities**
   - List, categorize and analyze the problems.
   - Sift and analyze the data identifying the issues.
   - Determine priorities for significance, impact and sequence.
   - Establish a method of determining priorities.
   - Prompt or encourage relevant managers to make priority choices.
   - Remain flexible, reviewing progress with senior managers as required.
   - Specify training needs in both human and business needs.
4. **Develop outline solutions**
   - Encourage creative input from the training team.
   - Balance against operational constraints.

- Commit a simple framework for an effective solution to paper.
- Introduce as an informal discussion document.
- Discuss with operational/line managers and amend, change, re-write etc.

5. **Re-examine and discuss with senior commissioning managers**
    - Finalize the broad issues.
    - Confirm agreement on priorities.
    - Ensure that managers who are affected by low priority needs are informed.
    - Ensure that related management actions are linked for coordinated implementation.
    - Pay careful attention to detail.
6. **Present final report to the management who commissioned the training needs analysis. This key document, should be welcomed by all:**
    - Ensure no new material is included that hasn't been seen by those who own the needs.
    - No manager who reads the report the report should be surprised by anything that affects them directly.
    - The report should clearly identify what the training function can do to assist the organizations people to achieve identified business goals.
    - The final report should be thought of as a contract between the training department and the organization.

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Activity point

Consider each of our six steps in turn:

- Will you find it easy to attempt all the steps?
- What will help or hinder you as you move through our model?

Organizing and planning the training needs study

Three key aspects need to be considered before you move forward to initiate any meaningful activities. They are:

1. Terms of reference
2. Resources available
3. Existing training documentation

1. Establishing terms of reference

During preliminary discussions with the client the following items need to be established:

Background

The background to the training needs project so that anyone who has no knowledge of the project will know the reasons for implementing it.

Aim of the training needs project

The aim of the project agreed between the client or sponsor and the project manager.

Client

The person or position in the organization who is responsible for promoting the successful outcome of the project.

The project team

The names of the project manager and team members. The background and qualifications of the team may be given if the client organization is large or external.

Scope

The scope will expand on the aim of the training needs project and set out its deliverables. It will also state the authority given to and limitations imposed on the project manager.

Budget

The amount of money allocated to the project and any restrictions about how the money may be spent. It may state the maximum amount that can be spent without referral to higher management.

Consultation

The people or organizations that the training needs project manger must or should consult to obtain information or services. The project manager may have to seek permission from the commissioning manager to consult with people or organizations not included in the terms of reference.

Methodology

The methodology that the manager will use in the training needs project. This may include a description of the main activities and resources. The amount of detail given will vary depending on the size and scope of the project.

Timescale

A project plan showing the times when activities will be completed and milestones reached. The amount of detail given will vary depending on the project.

Management

The management structure for the project. It will show not only the structural organization of the project team but include any steering group or working committees formed for the project. People in the organization who have some management responsibility for the project should also be included.

Reporting

The frequency and method of reporting project progress should be clearly laid down. This will include not only written reports but also meetings and presentations.

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Activity point

When setting up your terms of reference ask yourself (and your major client) the following:

Priorities

- What are the key concerns of senior management?
- Will these training needs focus on achieving improvement in key organizational goals?
- Is it possible that the needs identified will cause management to readdress their priorities?

Focus

- Is it to be an all embracing study covering the whole organization's ability to deliver the mission and key business objectives?
- Should the study concentrate only on key priorities?
- By what date must the study be completed?
- Are there important milestones that must be met along the way?

Scope

- Will it include all or only sample departments?
- Will the study embrace or ignore needs in associated departments?

Depth

Will the study include:

- Organizational issues such as culture, quality, customer awareness, team working, competencies and continuous improvement processes?
- Occupational needs which may require analysis to identify the knowledge, skills or attitudes needed in the post?
- Individual needs which will need examination of assessment centre information, performance management and appraisal reports and/or career development systems?

Breadth

- Will the study include residual, present and future needs?

Participants

- What individuals will need to be consulted and interviewed during the study?

2. What resources are available?

It is easy to underestimate the amount of resources needed to complete a training needs analysis. The limits on your resources my cause you to rethink the intended scope of your study.

- **Time requirements**
  – How much time will be required for all the separate activities of the study?
- **Budget**
  – What funding is available? (This should include the costs of any consultants, travel and publishing expenses.)
  – Are you going to factor in the costs of the time given up by all the participants?
- **Personnel**
  – Do you have the necessary expertise in-house?
  – Will you need external support?
  – Would external consultants have greater credibility?
  – What administrative backup is necessary/available?

3. Exploration of existing training documentation

The availability of a wide range of existing documentation may assist your study. Some may need to be updated as part of your analysis:

- **Training policy**
  – Existing policies will need to be reviewed and considered.
- **Training plans and budgets**
  – The context created by current training systems will need to be analyzed.
- **Previous training needs analysis reports**
  – They will provided insight into residual needs.
  – Have they all been addressed?
  – If not, why not?

- **Organizational documentation**

  Are they all relevant and up-to-date?

  Examples could include:
  - Competence frameworks
  - Job descriptions
  - Role profiles
  - Person specifications
  - Performance appraisal reports
  - Manpower forecasts etc.

Design and implementation of the survey

In an ideal world we could cover everything. In practice an exhaustive examination of the business performance from every department and team member is usually impractical. The main factors that can help shape the size of our survey include:

- The size of the organization
- Number of departments, sections and teams
- Range of areas and business objectives
- Resources available for the survey
- Degree of disruption acceptable to the organization
- The variety and strength of the change forces that impact on the organization

There are two distinct phases:

1. Preparation and analysis
2. Information gathering

Activity point

How familiar are you with the following steps in this phase? Where do you need to seek further help, advice or information?

1. **Preparation and analysis**
    - Terms of reference
    - Desk study of standard data
    - Refine key areas for investigation
    - Design interview instrument
    - Validate survey design
    - Refine focus on key areas
    - Collation and analysis of symptoms
    - Identify training needs

2. **Information gathering**
    - Preliminary review with key personnel
    - Conduct structured interviews
    - Conduct small group conferences
    - Conduct telephone interviews
    - Additional investigation tools

Choose between free and structured interviews

Free interviews

Typical features:

- Subject and interviewer share control between them
- Interview (typically) covers a wide range of topics
- Develops in a random order
- Difficult to remember what was covered or take notes
- Almost impossible to cross-reference information

Structured interviews

Typical features:

- Interviewer leads subject through pre-determined agenda
- Prompts and probing questions easier to use
- Pre-set format for notes

- Cross-referencing and analysis easier
- Additional topics can be covered in a discrete section

A structured interview will usually be the most effective and economic choice of survey tool. This approach will usually be more credible than other approaches. As a result of our preliminary work (reading) etc we should have a good idea of the issues around the key areas for investigation. This will enable us to design a pro-forma to act as an instrument to structure the interviews. It is always worth trialing the instrument on some of the intended recipients. This will allow you to iron out any difficulties, ambiguities etc before launching the round of interviews for real.

There is never an easy answer to how many interviews you should conduct. Too few and you will be accused of a small biased sample; too large and you may run into difficulties of managing time and expensive collation.

When there is insufficient time available to interview face to face it may be worthwhile conducting structured small group conferences with workers who carry out similar roles. Telephone interviews, video-conferencing and email discussion groups are other economical ways of gathering information.

What does a typical structured interview pro-forma look like?

A

Activity point

Have a look at our samples. What changes can you make to these typical survey documents to fit your organization's needs?

g

Structured interview pro-forma

Common opening statements include:

- Name of manager/team member
- Job title
- Level/grade
- Name of interviewer
- Date of interview

Objectives

The objectives of this survey are to:

- Agree changes in the business operating environment which have had an impact on the jobs of managers and staff within the function.
- Determine future plans and objectives affecting managers and their teams.
- Explore the impact of recent and anticipated changes.
- Assess the requirement for new methods of working, skills, knowledge and behaviour.
- Establish priorities both now and for the future.

Please note:

- The purpose of the survey is to establish business needs, not to review current or recent training programmes.
- Any review of training will be limited to determining changes in the needs of course participants for whom particular training programmes are targeted.

Sample A

1. What are the main functions of your department?

2a. What are the aims and objectives of your department?
- How clear and defined are these objectives?
- Who set them?
- How are performance levels set?
- How realistic are plans and targets?
- What are the priorities?
- How are they set?

2b. What needs can you identify arising from these considerations?

3a. How is departmental activity implemented?
- How clear are individual responsibilities?
- How clearly are jobs defined?
- How are performance standards set?
- What measures of performance exist?

- Are all jobs in the department interesting?
- Is job rotation employed?
- What barriers exist to efficient operation in your department?

3b. What needs can you identify arising from these considerations?

4a. How do you maintain effective control over your department?
- How do you gather information?
- How is information presented to you?
- How do you disseminate information?
- On what do you base decision-making?
- To what extent do you discuss decisions with your staff?
- To what extent are staff involved in departmental decision-making?
- To what level do you delegate decision-making?

4b. How do you maintain interdepartmental liaison?
- With which departments do you work most closely?
- Do they provide you with a satisfactory service?
- Do you receive complaints from other departments?

4c. What needs can you identify from these considerations?

5a. What contacts do you have or would you like to have with other departments or organizations?
- In-company contacts?
- Outside organizations?
- Desirable contacts?

5b. What needs can you identify from these considerations?

6. How will your department be affected by change in the following areas in the next 12 months:
- New technology?
- New equipment?
- Products/services?
- Procedures?
- Legislation?
- Staff turnover?

- Recruitment?
- Changes in other departments?
- Other changes (please specify)?

6b. How will you meet these changes in the next 12 months

- Have you a manpower plan?
- Who does what currently?
- Who is competent to cover posts in an emergency?
- What knowledge/skills will your staff need to meet changes in the next 12 months?

6c. What changes have you faced and dealt with effectively in the last 12 months?

6d. What needs can you identify arising from these considerations?

7. Which areas would you wish to discuss to determine how training may help meet your departmental needs?

8. From all the needs you have identified can you create a list of priorities?

Sample B

1. What are the major changes that have had a significant effect on the jobs of managers and supervisors?
2. What are your plans for the business/function/section:
   a For the next 12 months?
   b For the following 2-5 years?
3. What further changes in the business/operating environment or developments of recent changes do you anticipate?
4. In what ways will managers be affected?
5. What has bee the effect of recent changes on managerial performance?
6. What strengths and weaknesses have been exposed?
7. In the future which new skills/knowledge /attitudes will be most important?
8. For which positions do managers require particular preparatory training/experience?

9. Which aspects of their work do managers find most difficult?
10. Why are some aspects more difficult than others?
11. What actions would help managers overcome these difficulties and meet the major challenges they face?
12. Are there particular training needs which you consider to be a priority?
13. Are there any immediate changes to management which you would make?
14. Would you make any changes to the career development process for managers?
15. Do you have any other comments regarding the provision of management training within the organization both now and in the future?

Sample C

(Suitable for a quicker survey in a small team or organization.)

1. Summarize the nature of your job
2. Which aspects of your job are seen as most difficult?
3. Why are those aspects more difficult than others?
4. What would help you to do those things more effectively?
5. How many people do you manage directly?
6. What particular strengths can you identify amongst your team?
7. What aspects of work appear to cause your staff most difficulty?
8. What changes have there been in the needs of your team in the last two years?
9. What changes can you predict in the needs for your team in the next two years?

Collate the information

After the interviews collate the information on a separate training needs analysis worksheet:

Symptom	Problems		Training		Possible costs	Expected benefits
	Cause	Effect	Method	Objective		

Training needs analysis worksheet

Symptom

- The evidence backed by and cross-referenced to data.

Problems

Cause

- Organizational departmental and group training needs.

Effect

- Expressed in terms of effect on businesses objectives.
- Where possible this should include costs.

Training proposed

Method

- For each training need give brief details of the possible training/development actions.

Objective

- What workplace competence will the trainees be able to apply and to what standards?

Cost estimate

- First rough estimates only.

Expected benefits

- Prediction of gain to organization.

Training needs survey – analysis and report

One of the major outputs of your survey will be the analysis and report.

Here are some sub-headings you could use:

Introduction

- Terms of reference
- How report is structured
- Acknowledgements

Overview

- What it says
- What it concludes
- What it recommends

Main contents

- Clear references
- Numbered sections
- Easy to use and understand

Audit

- Study methods
- Factual evidence
- Sectionalized
- Cross-referenced

Conclusion

- Cross-referenced
- Supported by evidence
- No new material

Recommendation

- Priorities: now, next, later
- Trainers input
- Clear stepped plan
- Realistic priorities
- Clear benefits to managers and organization

Appendix

- Detailed support
- Evidence
- Non-training matters

A

Activity point

Examine our sample report. What aspects of our example could you incorporate into your own reports?

SAMPLE TRAINING NEEDS ANALYSIS REPORT

1. INTRODUCTION

1.1 Overview

This report presents the findings of the review of management and supervisory training within the Customer Services Division (CSD) It recommends changes to the way in which training is organized and delivered and sets out a proposed management training strategy.

1.2 Terms of reference

The terms of reference of the review were to:

- Examine how training can help the Customer Services Division (CSD) meet its business objectives and propose an appropriate strategy.
- Review the management training needs of staff to ensure their continuing relevance to CSD objectives and operation in the next five years.
- Determine the range of training methods available for use, and advise on the effective mix and methods for determining which to use.
- Make recommendations about the structure, systems, resources and content of proposed courses needed to satisfy priority training needs.

1.3 Scope

The scope of the review was the whole of the CSD's management and supervisory team, and how the functions of their departments impacted with customers and other parts of the organization.

1.4 Methodology

The focus of the review necessitated the collection of the following information:

- The purpose, objectives and priorities of CSD and the identification of those organizational factors that impact on training development needs and delivery systems.
- The current approach to training and development.
- The competencies required by staff in key occupational groups.

The research was conducted via a series of semi-structured interviews with 32 managerial and supervisory graded staff at 3 locations. The interviews focused on such areas as:

- What are the priorities of their current job?
- How are they changing?
- What that means for what staff do and how they do it.
- How can training best contribute to these developments?

The strategy also looked at emerging best-practice in the conduct of management training in the UK and their relevance to keeping CSD at the forefront of change and current trends.

2. BASIS OF THE TRAINING STRATEGY

The strategy is based upon the identified needs of CSD and its managers. The purpose of this section is to set out this basis under three headings: The principle managerial challenges facing CSD, how managers believe that training and development can help to meet those challenges, and an overview of some relevant trends in management training.

2.1 The managerial challenge

1. **Divisional status**. Whilst the full impact of divisional status is still emerging it is clear that it will lead to a changed set of managerial demands and greater calls on managerial capability. It will also

require substantially enhanced functional skills in such areas as finance, performance management and personnel procedures.

2. **Changing culture**. Discussions show that the organization is changing in many ways, but that also some things remain the same. The organization is in a state of transition and it is clear that many individual's perceptions are different on where the organization is now and the desired end state. Many managers see 'change is the way of life from now on' and are pushing for more change. Others are resistant or have a passive approach to change and the way it is being introduced. There is quite a lot of conflict and stress in the organization.
3. **Quality**. Improving the quality of programmes and services demanded by the external regulator and the customer will demand greater accountability from each manager and enhanced skills in identifying, achieving and maintaining quality standards. This in turn requires a strong managerial infrastructure with well-developed skills in objective setting, delegation and reporting.
4. **Customer service**. Improving the quality of service will require an enhanced commitment to customer service. This is likely to increase local responsiveness to satisfy local and regional variations in customer requirements. Managers will need to act as internal and external role models for the required standards of behaviour and recognize that the commitment to customer service is the direct result of their managerial reinforcement.
5. **Integration**. The integration of customer services and the setting up of the one stop telephone bureaus will require a greater breadth of knowledge and understanding of not only of the CSD and its various roles and responsibilities, but also with those of the organization as a whole. Particularly among more junior management and their staff.
6. **Motivation**. People will need to be motivated to achieve the vital changes discussed above, at a time when promotion opportunities will not be as strong as in the past. The proposed introduction of performance related pay would place further demands on managers to assess and encourage their staff.
7. **Management style**. The most important element in these challenges is a shift in management style. To achieve its business aims CSD will need to ensure that it moves from 'managing via paper' to 'manag-

ing through people'. This implies more emphasis being placed on results and achievement rather than effort and endeavour. The 'house style' will need to move away from bureaucracy with its emphasis on administering systems, penalizing failure, economizing, rigidity and centralized control, towards a more proactively managed approach with an emphasis on managing resources, valuing initiative, being cost effective and an enabling approach devolving responsibility and encouraging a flexible 'no blame' culture.

2.2 Challenges to training

Over the past year the central training department has succeeded in raising its profile and the commitment from management and staff to using training solutions to address business needs. It needs to ensure that it continues down this path and makes sure that training is:

1. **Business led**. Management training needs to continue to break away from individuals self-selecting to attend courses chosen at random from a training-menu. Management training should be directed at the needs of the business and managers should be helped to identify their development needs in line with business requirements.
2. **Workplace based**. More recognition should be given to developing training solutions that can be utilized in the workplace. Apart from the inconvenience caused by being away from work at a training centre many skills can be best acquired at the workplace through mentoring, coaching, desk and small group training, as well as self-directed learning. This encourages greater responsibility for taking charge of learning and enhances the standing and self-esteem of the managers involved.
3. **Feedback and evaluation**. Systems need to be set up to ensure that managers and course participants know why they are going on training courses, what the business hopes to gain. That there is appropriate monitoring during and shortly after each event to ensure that the course objectives have been achieved, and finally there is a full post course briefing and evaluation to ensure that the original needs have been satisfied.
4. **Brisk and business focused**. Managers need more intensive training to capitalize on their time away from the workplace. Courses should have a specific focus and be heavily directed towards developing skills and understanding rather than merely imparting

knowledge. Their pace should accurately reflect the pace of working life and they should be as short as possible to achieve their aims.

5. **Cover all levels**. The changes facing CSD will require greater competence at all levels. Senior and middle managers will need to demonstrate their commitment to training and the needs it addresses by taking part in any established programmes and giving them their top priority.
6. **High profile consultancy**. The internal training team needs to continue the process of being actively involved in helping managers achieve their business needs. They should establish that training is not an add-on but an integral part of the day to day running of the business.
7. **Cost effective**. "If you think training is expensive try ignorance!" Managers should be encouraged to see training as an investment rather than a cost. It will need to be targeted on business and individual needs and supporting systems established to ensure that CSD is getting a return on their investment.

2.3 Best practices in management training

CSD's training strategy will need to take into account the emerging trends in training practice in other top UK organizations. The following are deemed to be particularly relevant:

1. **Business needs**. The importance of ensuring that training equips managers to meet business needs is now widely accepted. Company A require that a director sponsor each training initiative by specifying the business requirement, the performance requirement and the consequential training requirement.
2. **Job needs**. Organizations such as B are introducing approaches based on managerial Competencies, to bring a clear job enhancement focus to their training activities.
3. **Individual needs**. C identifies individual training needs using an assessment/development centre approach. All managers, up to and including senior level, attend an assessment course where their current needs and future potential are assessed against a common set of criteria.
4. **Learning resource centres**. D operate schemes whereby staff have access to a library of books, audio and videotapes and CBT

programmes to provide self-directed learning opportunities. More and more organizations are enabling access to their LRC's via email and internet and/or intranet.

5. **Training evaluation**. E has introduced a series of business ratios to evaluate the effectiveness of its training programmes.
6. **Decentralized training**. F have a group training manager who is responsible for presenting policy issues and new developments to appointed managers in each division, who are in turn responsible for implementation using centrally devised core programmes.
7. **Investment in training**. Many organizations express their commitment to training by setting performance indicators for achievement, e.g. G's senior management development programme specifies 5 days off the job training.
8. **Cascade effect**. H ran a 'Leadership 500' programme for their top 500 managers aimed at achieving quality through people and ensuring a common house style to the approach. This programme is now being extended to cover more junior managers under the name of 'Leadership 5000'.

2.4 Summary

It is against this background that we have developed and recommend the training strategy that follows. The strategy is firmly grounded in the views of the managers and supervisors consulted, both about the challenges facing CSD and their reflections about the way that management training has been delivered in the past. It also reflects the best of current trends in the development of management training and the requirement to be realistic about what is achievable.

3. THE STRATEGY

If CSD is to achieve success it must be supported by managers and staff who are fully equipped with the knowledge, skills and attitudes, coupled with the cost effective procedures, that the business requires.

It must view training and development as an ongoing process devised to help it achieve these business needs. A process that is geared to developing the right people, in the right way, at the right time and place.

Training needs to be flexible to meet the ever changing and developing needs. As well as focusing on the immediate, it also needs to be able to take a long-term perspective to develop managers for the future.

To achieve all of the above we recommend that CSD's strategy covers three complementary areas:

1. **Corporate training initiatives**. These will be used to orientate groups of managers and staff to new business priorities as they emerge.
2. **Competence based training**. An open menu of short courses and workshops which will ensure that all managers are equipped with the necessary building blocks of knowledge and skills to perform effectively in their current jobs.
3. **Career development training**. This will be used to equip managers with the skills and knowledge to keep up to date in their professions and to progress to other jobs within CSD.

3.1 Corporates training initiatives

Change is most often achieved effectively when a critical mass of individuals are equipped with the necessary new attitudes, knowledge and skills over a concerted period of time. This mass then tips the balance and ensures that the organization moves in the right direction. CSD have already started to move in this direction with the Business Appreciation Seminar and the Customer Care Programme. We recommend that these are followed up and reinforced by the following initiatives:

1. **Customer service training**. The initial event should not be seen as a one-off and should be followed up with a programme, with a strong UK bias, to continue to develop a uniformly high standard of customer service.
2. **Performance management training**. Ensuring a common approach to short and medium-term business planning, identification of key performance indicators, delegation of responsibility and authority for identifying blockages and taking remedial action.
3. **Quality management**. Forms a direct link between 1 and 2. All staff should be actively involved so that they take on board the values and attitudes, which are necessary to make this approach work. With many staff either in new jobs, or being required to take on new detailed work, it is essential that they know what they have to do, to what standard and why. New procedures manuals should be drawn

up, in plain, user-friendly English, to enable staff to get the basics right. Adopting recognized quality standards and applying for accreditation should be considered.

4. **Organizational development initiative**. If the above interrelated initiatives look mainly at content (what is done) this initiative looks at process (how things are done). It is one of the key methods for enabling an organization to develop, manage change and encourage a flexible and innovative workforce. It takes vertical slices of staff and focuses on improving the interpersonal relationships without which any attempt to develop a 'culture of excellence' is doomed to fail.
5. **Induction training**. We recommend that a high quality, flexible induction programme be developed for each category of staff, especially casuals, when they enter CSD or move to new jobs within it. Induction training should aim to increase the depth and breadth of understanding that staff have of their work, the context within which they are doing it, and establishing benchmark personnel policies (e.g. equal opportunities, health and safety etc.) Induction is largely about knowledge but attitudes also need to be addressed. It helps establish new comers into a rapidly changing environment and make them feel it is their organization.

3.2 Competence based training

The term 'competence' is used to describe something that a manager needs to be able to do to perform their job effectively. There are several models that are currently in operation, e.g. the Management Charter Initiative and many organizations have developed a framework of competencies around which managers are developed and appraised. CSD should seriously consider going down this route in the future, although in the short-term there are so many competing initiatives both within (performance appraisal) and outside (Investors In People) that I would advise a watching brief at this stage, rather than a definite commitment to a particular initiative.

During our survey we asked the managers concerned, "What are the key competency areas that you need to be good at to be effective in you job?" We asked them to relate their answers to the current and future situation. Their answers provided us with this part of the strategy, which concerns the precise targeting of training resources on the development of managers in the knowledge, skills and attitudes they need in their present jobs.

Managerial jobs are complex and varied. Different individuals with different backgrounds, training and responsibilities will have different development needs. We don't therefore recommend a blanket approach for all managers but we recommend a two-part approach. In part one I have identified four areas of competence that the majority of managers concerned regarded as priority items for developing new knowledge and skills. In part two we recommend an open menu of short workshops and courses, which are the building blocks for effective management for CSD and to which managers can take advantage according to their individual development needs.

PART ONE – MAIN PRIORITY AREAS

The following areas were identified as particular priorities during the review:

1. Personnel responsibilities

Covering such areas the knowledge and skills required to carry out their devolved responsibilities in such areas as absence, inefficiency, discipline, recruitment and selection, grievance, health and safety etc.

2. Team and leadership skills

Effective people management skills in the team/group context were identified as a key element on being able to manage in the rapidly changing environment of CSD. Topics to be covered would include the role of the manager, motivation and leadership style, handling conflict within and between groups.

3. Developing financial responsibilities

Within this category there were two overlapping areas. Developing greater commercial awareness about the financial side of running a business that is now a publicly quoted company; and using financial information, a more practical skills based approach developing the knowledge required for budget planning and analyzing financial information.

4. Developing computer awareness

With more information being centrally available on computer it was clear that, apart from a small number of IT literate managers, people are not making the best use of the information available. There is an obvious strong overlap with 3 above, and again the twin need of developing awareness and training in specific skills.

PART TWO – THE OPEN MENU

We also discovered from listening to the views expressed throughout the consultation process that there is a need for training in a number of other specific skills, but that these needs are less general than those identified in Part One. We propose that a number of short workshops be developed for staff who need to learn, or update their skills. The following suite of courses cover the areas that were most frequently mentioned:

1. Report writing
2. Time management
3. Presentation skills
4. Managing meetings
5. Negotiation skills
6. Coaching and training your staff
7. Counselling and stress management
8. Interpersonal skills.

Short workshops were regarded as being particularly important, because staff that have reached this level typically want to be selective about the skills they need to develop and the amount of time for which they can afford to be released for off the job training. Course design would need to ensure that they are brisk, comprehensive and customized to suit the needs of this target group.

3.3 Career development training

In order to develop a cadre of managers who can fill more senior posts CSD will need to ensure that it doesn't just concentrate on the needs of today but also looks to develop the knowledge, skills and competencies necessary to take the organization into the next decade. Failure to address this problem would mean a gap developing between what the company then needs and what its workforce can deliver. We recommend a two-pronged approach.

1. Developing professionalism

Managers should be encouraged to acquire a professional qualification in a relevant discipline. Many people in CSD are, however, generalists rather than subject matter experts. We recommend that these individuals are given every encouragement to become 'professional managers' either by following the Institute of Supervisory Management, for first line managers, or following the Open University Business Schools courses for middle managers.

Managers value nationally recognized qualifications; they are a powerful motivating factor in personal attainment and demonstrate a commitment by CSD to human resource development in general and that individual in particular.

2. Continuous professional development

Managers should be encouraged to attend a variety of external business and technical seminars. These must reflect both the organization as well as that individual's needs. A reporting and evaluation mechanism should be set up to check whether CSD are getting value for money, and to disseminate the information gained throughout the organization.

This approach has the value of keeping CSD up to date with the latest developments, help to avoid insularity, and again shows commitment to being a forward looking organization.

4. Ensuring training effectiveness

Training expenditure should be carefully controlled and monitored. The training and development team will need to ensure that managers are using the most effective range of training responses to meet their identified needs.

We recommend that the role of the training department continue to develop along the facilitating and monitoring lines it has started to develop. The training staff should assist line managers to identify priority training needs, and to make the link between individual objectives and corporate objectives.

They should advise line managers on appropriate approaches to meet the identified training needs and on selecting a cost effective combination of training methods, which may or may not include training courses.

A Learning Resource Centre should be set up to offer managers an internal, alternative, approach to development other than going on training courses.

Personnel and training will need to monitor that performance appraisals are taking place systematically, and on time, and that the training and development needs are identified and incorporated into the CSD forward training plan.

Whilst a great deal of on-course validation takes place there seems little evidence of any pre or post-course managerial involvement. We recommend that the training department should assess and ensure the effectiveness of training by, not only monitoring training as it progresses and steering it to ensure that it achieves its objectives, but also by assessing the success the learner has in applying learning in the workplace.

The overall strategy we propose should ensure that the training programmes provided by the training centre will be based on the needs of the individual and the organization, so that training people in the competencies they already possess to the necessary standard does not waste resources.

5. Conclusion

The training and development strategy recommended in this report is a major opportunity for CSD. It will help bring about a change in the way CSD is served by management training and mirrors the radical changes taking place in CSD itself.

The three complimentary approaches are founded on experience and success elsewhere, in both the private and public sectors, and will target attention and resources on training geared to business needs.

The proposed strategy will enable CSD managers to respond quickly to corporate change, equip them with the competencies they need to do their jobs effectively, and help them develop themselves and the organization for a successful future.

Discuss the training needs survey and report with senior management

If you have prepared the ground well the report you have written will be eagerly awaited. Having put the report together you must ensure that it is acted upon. This will invariably involve the process of making a presentation to a group of senior managers who can authorize the implementation of your proposal.

The following are the key points to be taken into consideration when making a persuasive presentation.

Making a persuasive training needs presentation

Introduction

This can be summed up by the mnemonic INTRO:

Interest	Graphic representation of organization mission, objectives
Needs	Blockage to performance or success or opportunity for improvement
Title	Snappy, attention grabbing, memorable
Range	Structure and sequence of your talk
Objectives	What the training team want the management audience to do

Development

Present position

- Organizational objectives
- Performance levels
- Obstacles to performance
- Key management concerns

Problems

- Training needs
- Link human performance to objectives
- Relationship with key management concerns

Possibilities

- Broad range of proposals

- Pro and cons of each part
- Pre-handle objections (e.g. key individuals resistance)

Proposals

- Priorities
- Preferred training interventions
- Pre-requisites for success (e.g. top-management support)
- Outline training schedule
- Identify clear first step

Conclusion

Summary

- Key business goals of training intervention
- Brief overview of proposals
- Re-emphasize benefits

Questions

- Any points unclear
- Any concerns
- Handle their objections

Recap

- Restate key points after lengthy questioning/discussion

Final point

- Make it clear that the next steps are in the hands of the commissioning manager not with the trainers who conducted the training needs analysis.

Key criteria

- Use visual images and graphs to illustrate the evidence of the training need
- Utilize the same professional approach whether you are presenting to a small meeting or a formal presentation to a large group of managers
- Use appropriate business language and avoid trainer jargon

- Reinforce the impression you are representing a training function that is an equal partner with line managers in producing business results
- Demonstrate the consensus achieved with line managers in reaching your conclusions
- Quote and name managers who agree and are committed to your proposals

A

Activity point

Think of a training needs analysis presentation you will have to make. Apply our template and practice the presentation in front of a group of peers.

Ask them to role-play particularly awkward individuals. It may be an advantage to record your presentation on CCTV for later review and analysis.

Checklist

✓

Activity point

Review our list of action points. Have you completed each step? If not, why not? What can you do more of, less of or differently next time?

- ✓ Preliminary meeting
- ✓ Draft terms of reference
- ✓ Approval of terms of reference
- ✓ Project plan
- ✓ Desk study – review standard data and management reports
- ✓ Preliminary study interviewing commissioning and other key managers
- ✓ Draft structured interview survey instrument

- ✓ Validate structured interview survey instrument
- ✓ Identify target survey respondents
- ✓ Plan milestone meetings with commissioning manager
- ✓ Plan survey logistics
- ✓ Book appointments
- ✓ Conduct interviews
- ✓ Write up results
- ✓ Analyze data
- ✓ Book supplementary interviews
- ✓ Telephone requests for additional data
- ✓ Conduct extra interviews
- ✓ Book small group conferences
- ✓ Conduct small group conferences
- ✓ Conduct supplementary investigations
- ✓ Cross reference evidence
- ✓ Record and process data
- ✓ Identify training need problems
- ✓ Develop first draft of priorities
- ✓ Review priorities with department managers concerned
- ✓ Outline solutions
- ✓ Discuss possible solutions with line managers

- ✓ Review emerging needs and solutions
- ✓ Identify links between training solutions and other management actions required
- ✓ Discuss outline proposals and impact on business objectives with senior managers
- ✓ Write report
- ✓ Distribute report to appropriate audience
- ✓ Prepare presentation to sell report as package
- ✓ Present results of investigation
- ✓ Obtain authorization to implement solutions
- ✓ Log outstanding issues for further investigation
- ✓ Ensure managers affected by lost needs are informed by own managers
- ✓ Publish outline training activity schedule
- ✓ Analyze lessons from project and plan next steps

Chapter five

Designing effective training – an overview

Introduction

By the end of this chapter you will be able to:

- Define the term 'design' and relate the definition to the training process
- Identify the ten steps involved in designing effective training
- Rate your current level of competence in each of the ten steps
- Devise an action plan you can use to become more proficient in key steps

Anyone new to training management will need to answer the question:

Where do we start and in which direction do we go?

In this chapter we will introduce you to the essential steps you must take to ensure you have a professionally designed training product that meets the training needs of your organization.

What is design?

'Design is... a problem solving activity which can never yield the one right answer. It will always produce an infinite number of answers – some righter, some wronger.'

V Papenek, *Design for the Real World, Pantheon,* 1973

Although written in a different context, when applied to training and learning events our definition seems to ring true. The design process has a number of other characteristics:

- It generally involves making a large number of decisions.
- It has to look forward and predict future events.
- It involves creative activity.

Two key features that distinguish the design of training and learning events from other forms of design are:

- The design is of a social interaction that is dynamic and constantly changing.
- The trainer will invariably take a key role in this interaction.

This adds complication to the task since the trainer will have to ensure they can effectively implement what they have designed.

In practice the training designer has to anticipate the situations that will occur within the learning event, anticipate their outcome and make numerous decisions.

A

Activity point

What activities do trainers traditionally focus on when asked to design an event? List your ideas below.

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ______________________________

We expect your answers show that most trainer's thoughts immediately fix on what to include in the sessions, for example:

- What should I include in my presentation?
- When should I break the group into syndicates?
- What questions should I ask and when?
- Which visual aids should I use?
- Shall I show a training video?

If the event is to be successful, then as the training manager you must ensure you stop to take stock of the other main phases involved in the training process. This will have the benefit of focusing on what is really wanted, guiding the trainer away from 'quick-fix' remedies that can trap the unwary.

A

Activity point

The training cycle

Think of an occasion when you have been involved in a learning event that was noticeably successful. This could either be as the training manager, setting up and running the event; the trainer, delivering the material and facilitating the exercises; or as a delegate participating in the learning process.

When you have thought of a suitable event think about the various stages that were involved. Don't just focus on the content of the event but try to identify the overall structure. At what stage did the training event actually start? What steps preceded the event? What followed as the event moved through to a successful conclusion?

Now list below, in chronological order, the typical stages and flow of the training event:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

Ten steps to effective training

There are a number of separate phases, each of which needs a range of skills and techniques. Whilst there is no universally accepted approach, the most popular models incorporate material developed by the Industrial Training Boards. *(See A guide to the identification of training needs, T.H. Boydell, BACIE, 1971.)*

The model shown below is based on many years of practical experience. It includes the application of learning theory and has been rigorously tested in the workplace. We can recommend it because we know that it works.

Step one – Identify the training need

Step two – Clarify your training objectives

Step three – Consider your target audience

Step four – Develop your course overview

Step five – Choose your methods and media

Step six – Prepare your leader's guide

Step seven – Bench-test the event

Step eight – Implement the event

Step nine – Follow-up the training

Step ten – Evaluate the outcome

Consider the differences between our model and your list. Note where there are overlaps and pay special attention to the steps you may have overlooked. Our next activity helps you assess your current level of competency in these steps

Exploring the ten steps

We will briefly describe each of the ten steps to give you an insight into what is involved.

Step one – Identify the training need

Identify the gap, investigate, prioritize

This the key first step from which all the others flow. The need may arise because you have your finger on the pulse and want to stay one step ahead of your competition. There are other times when the need becomes triggered by a problem that needs addressing because something is going wrong in your organization.

There will be occasions where no investigation has been carried out to find out what is the true cause of any problem. As a trainer you may just be presented with a scenario, e.g. "Absenteeism is up and productivity is going down! We need some training, can you fix it?" This process will help you identify the gap between what is actually happening and what should be happening – at either an organizational, team or individual level.

Rather than jumping in and solving the immediate problem the training manager needs to investigate to identify the true cause. This will help you decide if the problem is one that can be solved by training or will other remedies be more effective, e.g. changing shift patterns, ensuring the supply of quality resources on time or providing a company bus service.

Once you have determined the problem is a *'training problem'* you may have to decide which critical areas will be your first priority. When identifying priorities you will need to think of the urgency and importance of each critical area. Which will provide the biggest cost-benefit. There may also be structural, legal or financial considerations that can help you make your decision.

Step two – Clarify your training objectives

Criterion, terminal behaviour, observed improvement

Having identified the gap between current performance and expected or anticipated performance you are now in a position to be able to determine the objectives for your training event. The objectives are a description of the terminal behaviour that is your goal for each of the participants. In achieving this behaviour they will be able to close the gap identified in Step one.

Your training objectives should specify what the trainee should be able to do at the end of the training event, with what level of precision and under what conditions.

Effective training does not end at the classroom door. You should also be able to specify what they will be able to do on their return to work and what benefits the organization will gain from their improved performance.

Step three – Consider your target audience

Current level, motivation, learning style.

People are not machines. They cannot be neutral. Each participant will bring to the event different levels of accumulated skills and experience. You need to know your target population and identify the gap between their existing knowledge and what you're aiming at by the end of the course. The more precisely you can identify the gap, the more precisely you can plan how best to close it.

People are more than the sum of their skills and knowledge. They will also have developed attitudes based on their own experiences. Their previous experiences of learning and how they perceive they are treated by the organization can have a considerable impact on their motivation. This in turn will have an impact on how quickly they assimilate any new learning material.

Different adults also have different styles and preferences as learners. Knowledge of your audience's learning style can have a marked impact on your design. e.g. a group of engineers who are keen to learn how to apply practical approaches that will directly solve their problems will usually not sit still for a long lecture on the theoretical background which explores several hypotheses but comes up with no conclusions.

Step four – Develop your course overview

Hierarchy, sequencing, enabling objectives

Having identified your overall objective you are now in the position to be able to devise your master plan for the event. You should be able to break down the overall objective into its key components. Each of these, when combined will enable them to demonstrate the behaviour you are aiming for. Each of these stages can become a session or a step in themselves.

Consider the most effective overall running order that will help you take them from what they know into new areas. It is usually advisable to start with the simpler skills and then develop more complex ones, e.g. when teaching tennis, straight forward ground strokes come before cross-court, backhand drop-shots.

Is there a mechanical sequence that has to be followed? Teaching in that order can help re-enforce the sequence and build the foundation skills on which latter performance depends, e.g. teaching how to serve before how to volley. If you can't master the first skill you won't have the opportunity to use the second.

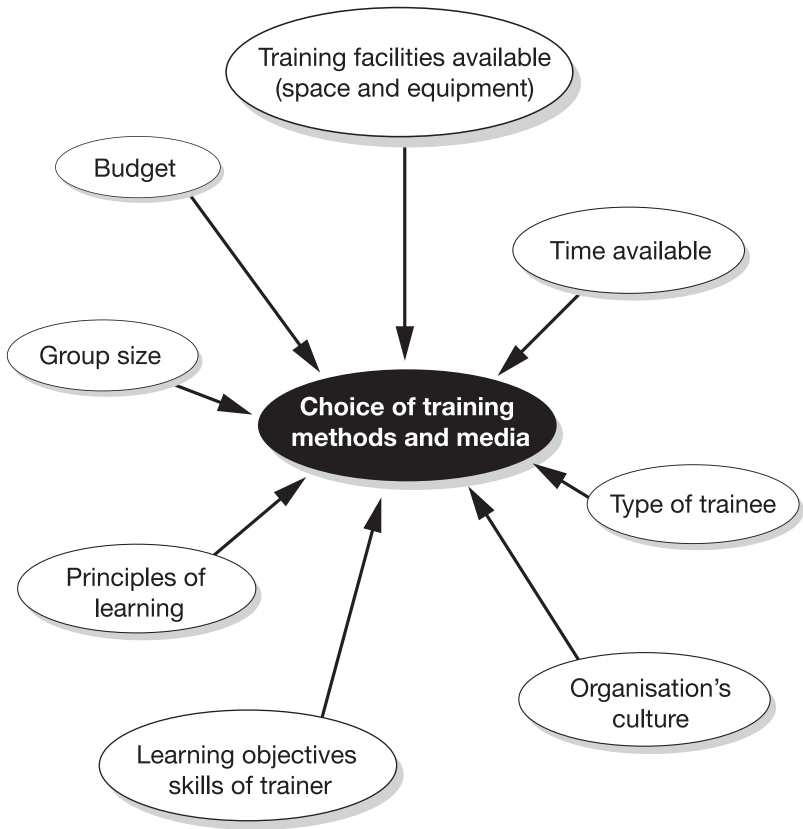
At the end of this stage you will be able to build up an overview that shows the hierarchy of your teaching objectives. This is a bit like an organization chart of the learning event. Each individual session will have an objective of its own. These will build up to enable the trainee to demonstrate the overall objective of the event. (It's why they are often called enabling objectives.)

You should now be in a position to draft an overview of the individual sessions that will make up the whole event.

Step five – Choose your methods and media

Influences, methods, considerations

Point out that when designing training events the training manager has to take into account a number of complex factors. The media and methods chosen for each eventual training session will involve a balancing act between these various influences. Achieving the right balance will require considerable skill on the part of the trainer. The following model can act as an aide-memoir to ensure you give consideration to a wide number of factors.



Influences on the design of training

When you make your design choices you have to live in the real world. For example, there will be little point in specifying the group watch a film if you have no projector, blackout facilities or (even) no electricity. It would be equally inappropriate to design an experiential encounter group using therapeutic tools such as transactional analysis, unless the trainer has the necessary knowledge, skills and experience and this approach is acceptable within the setting of your organization.

Considerations

There are many popular methods that the trainer can deploy as part of a training event. When deciding which methods to choose from the range available you will need to be guided by three factors:

1. Your knowledge about how this method works.
2. Your trainer's skills in being able to carry out the method effectively.
3. How applicable it is to the objectives of the session and event.

A

Activity point

Make a list of some of the popular training methods you might consider using in your training design:

1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________
5. ________________________________
6. ________________________________
7. ________________________________
8. ________________________________
9. ________________________________
10. ________________________________

Step six – Prepare your leader's guide

Session plans, handouts, storyboards

Having considered the range of methods available and identified which are most likely to help you meet your learning objectives you are now in a position to pull all the threads together to create a detailed written plan of the training event.

You may have all the necessary material in your head but this process will enable you to take an overview and consider if your event flows in the most effective and economical manner. Taking time to write down what you intend should happen is essential if you want to hand over the event to other trainers, confident that they will be able to understand and deliver as effectively as you.

This is best done by writing a leader's guide for whoever will eventually deliver the event. The leader's guide is made up of three interrelated documents:

1. **Session plan.** The guide should have a separate plan for each session that makes up the overall event. It is the essential route map so that any trainer knows what to cover and in what order. It needs to be sufficiently well developed so that any trainer picking up the guide will quickly come to terms with the philosophy of the event and see where each session fits in as they progress towards the ultimate objectives. It usually contains enough information to point the trainer in the right direction but should not overwhelm them, or present the material as a rigid script that does not allow them to use their own experiences and style when covering the main teaching points.
2. **Handouts.** The session plan will show at what stage what particular handout should be issued. Handouts will generally fall into one of two types:
   a) *Training materials*. These are for the participants to use at the learning event. They should contain all the necessary information to enable them to carry out whatever activity the session plan indicates. The materials should be clear and comprehensive, explaining background scenarios, the procedures the participants should follow, individual roles where different from those of other participants.

   b) *Learning materials*. These are for participants to study to help them make sense of the subject under discussion. They could consist of a trainer's summary of what should have emerged, rulings and outcomes of what actually happened when the material was used in a real workplace setting, expert's opinion, reading lists, check-lists or aide memories.
3. **Storyboards.** This approach is borrowed from the world of television and advertising. It uses a series of empty boxes to build up a visual story line that each session will follow. By providing a summary of all the visuals it will enable the trainer

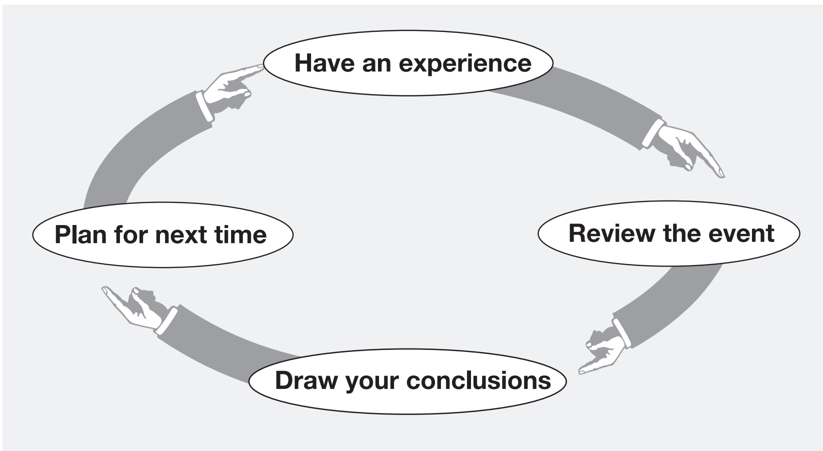
to recognize what visual to use at what stage. During the planning stage this approach will help you establish linkages and design appropriate visuals to meet your training message.

Step seven – Bench-test the event

Trial, review, revise

Far too often we end up *'practising in the final'*. Designs that look good on paper don't always work when they are carried out. As we mentioned, a training event involves interaction between participants and trainers. Precise timing can be difficult to predict. Our information about the participants may be less than accurate. We know precisely what we meant by a well written exercise; unfortunately participants interpret our instructions with unforeseen circumstances.

Training design should follow the same steps as the overall training process and cover each stage of the learning cycle.



The learning cycle

Assemble all the materials covered in your leader's guide. Talk through your design with a small team of interested parties. This could typically be another trainer, a member of the training design team and someone from the users (client) department. All the material produced should be discussed and evaluated. Any alterations will need to be made before the pilot run.

When running a pilot you will need to make sure you have brought together a representative sample to act as the audience. Inform them they are going to complete each of the sessions in exactly the same way as the target audience, but they have the additional task of helping you review the learning material, sequencing etc.

Don't make things too difficult for yourself by choosing people you know are going to be over critical because of personal agendas towards training or the organization. Choose individuals who have a wide range of knowledge and experience whose opinions will be well respected by your clients and the target audience.

You may feel it appropriate that as the designer you try out the material for yourself. If however, you are not going to be involved in the delivery this is an ideal opportunity for another trainer, preferably someone who hasn't been involved in the design or development stage to try the material out 'for real'.

At the end of the pilot programme you will once again need to stop to consider the feedback from both the delivering trainer and the participants. When you have made the revisions suggested by the pilot test you are ready to launch the programme.

Step eight – Implement the event

Launch, involve, review

When the pilot has been a success make sure that you let everyone know. If it has been a total failure you will need to review what has gone wrong and then hold another pilot to eradicate the problems.

When you have a successful and workable product make sure that it is properly launched in your organization. Write an article for the company magazine and enlist the help of the pilot participants and their managers in spreading the word about how effective the training has been.

Senior management will need to be seen to be backing the programme. In addition to the customary chief executive's letter of support, try to ensure that all senior managers that are due to attend come on the early courses. If they are allowed to slip through the net it will give a clear message about lack of commitment to the other participants.

In addition to gaining the explicit commitment of senior managers you will also need to make sure that the immediate line managers of the participants are also involved in the process. They will form an important role in raising trainee's expectations before they attend. An equally essential activity will involve them in de-briefing the trainees when they return to work. This discussion should focus on how the new learning can be applied to make a real difference to both the individuals and organization's performance.

Constantly review the training programme against the leader's guide and the overall learning objects you set out to achieve. The pilot test may not have been truly representative. You should not adopt a knee-jerk response and change the programme for the smallest criticism, but if your reviews show a regular pattern in highlighting a session or area that isn't working step in and make the necessary alterations.

Step nine – Follow up the training

Action plan, projects, workshops

Training does not start and end in the training room. It is a widely reported phenomenon that whilst trainees learn in the classroom they sometimes fail to translate their learning back to the workplace. (This is sometimes called *encapsulation* when the training is enclosed in a capsule and not applied to their work.) Involvement of both senior and direct line managers can go some way to overcoming this problem. As the training manager you should also be thinking about this transferability of skills as part of the overall design. Individual sessions should end with time for reflection and review, and the participants should return to work with an action plan they can discuss with their managers.

Consider what range of follow-up activities you can use to make sure that the training is applied. This could include the trainees completing a group based or individual project that addresses a real problem identified before the training started.

You could consider a formal review workshop where the participants return to discuss how they have implemented their learning. This will enable them to discuss current problems, identify possible solutions and give the trainer a chance to update them on recent developments or hold skill building sessions on more advanced approaches that weren't appropriate until the participants had mastered the basics.

Step ten – Evaluate the outcome

Costs, benefits, outcomes

This final stage will involve you in going back to the start of the training cycle. The whole process was started because someone identified a need that could best be addressed through training. For the training department to survive and prosper it must show that it has been of benefit by providing the solutions in an efficient, effective and economical way.

Analyze the costs

This stage will involve making an estimate of how much the whole training programme has cost. Each of the various stages from conducting the training needs analysis, designing the event, conducting the sessions and following through with post-training events and evaluation will need to be costed.

Identify the benefits

You will need to examine a number of organizational performance indicators to discover the impact of training. In some areas these may be easy to identify but what is often more difficult is to isolate the impact that training had on the improved performance. For example, was the improvement in sales due to the increased skills of the sales force or was it due to a new client moving into the area or favourable swings in exchange rates.

Evaluate the outcomes

However much the trainees enjoyed or learnt from the experience of the learning event the main conclusions that many managers are looking at will involve you in making a comparison between the costs and the benefits. At least if you are monitoring the overall outcome you will be able to include a number of "soft" items (i.e. difficult to measure items such as changes in attitude or customer satisfaction) in your analysis as well as 'hard' ones (those more amenable to being analyzed such as increased sales figures or cash saved).

To become an effective training manager you will need to master a number of different approaches to evaluating training. After all, ultimately your job may depend on it!

Activity point

Consolidation exercise

Spend some time thinking about your own knowledge, skills and attitudes in relation to each of the ten steps covered. Rate yourself on your current level of competence (using a five point rating scale) for each step.

TEN STEPS TO EFFECTIVE TRAINING	1	2	3	4	5
Step one – Identify the training need					
Step two – Clarify your training objectives					
Step three – Consider your target audience					
Step four – Develop your course overview					
Step five – Choose your methods and media					
Step six – Prepare your leader's guide					
Step seven – Bench-test the event					
Step eight – Implement the event					
Step nine – Follow-up the training					
Step ten – Evaluate the outcome					

Rating scale:

1 = Outstanding

2 = Very good

3 = Acceptable

4 = Not up to standard required

5 = Very poor

When you have finished your self-rating discuss your ratings with someone who's opinion you respect. Explore the evidence you used to arrive at your rating for each step.

Now prioritize your needs and identify an action plan you can use to develop the skills and knowledge required to become more proficient in each step.

A

Activity point

My priority areas for development are:

1. ____

____

2. ____

____

3. ____

____

Checklist

✓ Remember that training design is a problem solving activity that can never yield one unique answer to any training need. There are always options and choices to make.

✓ The effective training design process moves through a cyclical process involving ten main stages.

✓ For every training intervention make sure you:

- Identify the training need
- Clarify your training objectives
- Consider your target audience
- Develop a course overview
- Choose from a wide variety of methods and training media
- Prepare a leader's guide
- Bench-test the training event
- Implement after making any revisions

- Follow-up the training
- Evaluate the outcome

✓ Continually review and update your competence in each of the ten steps.

Blank

Chapter six

Planning to meet your needs

Introduction

What is a plan?

The benefits of planning

So how do I produce a training project plan?

Work breakdown structure

Gantt charts (Bar charts)

Network analysis diagram

How can I shorten the time it will take to complete the training project?

Identifying and communicating responsibility

Checklist

Introduction

By the end of this chapter you will be able to:

- Identify the main benefits associated with planning.
- Use OARS to help you plan a training project effectively.
- Use a variety of project planning tools such as Work Breakdown Structures, Gantt Charts, Network Analyses and Responsibility Assignment Matrices.
- Implement action to shorten the critical path to make sure your training project finishes on time.

What is a plan?

"A formulated or organized method by which something is to be achieved."

"A table indicating times, places etc. of intended proceedings."

Concise Oxford Dictionary

The benefits of planning

'Failure to plan is planning to fail'

The benefits of planning

- Makes it easier to know where we are going.
- Formulating short-term goals to achieve longer term objectives.
- Makes us think before we act.
- Gives a clear sight of the end objective.
- As we work it helps keep sight of our destination.
- Saves us time.
- Helps us prioritize.
- Helps us put our efforts into the right areas to achieve objectives.
- Enables us to schedule our resources to maximum effect.
- Save us money as we may be able to achieve more with less staff.

- Enables us to anticipate problems and identify potential solutions.
- Helps us to identify who is going to do what.
- Identify the training needs they may have.
- Improved motivation and morale.
- Makes achievement more likely.
- Helps us put forward an increase, or a better mix of resources.
- Gives senior management a basis for making judgements on your requests.
- Increases your sense of professionalism.
- Improves your all-round management performance.

Large and complex training projects require planning to:

- Determine how achievement of objectives (such as cost and duration) will be measured.
- Determine the level of resources needed.
- Allocate work.
- Establish targets and milestones for progress monitoring.
- Provide a means of communicating information and decisions.
- Minimize risk.

So how do I produce a training project plan?

To develop an effective plan they will need to identify a number of key pieces of data and to reach your destination successfully you need OARS:

O – Objectives

- **What are you trying to achieve?**
  Objectives are always more effective if they comply with the SMARTER approach outlined earlier.

A – Activities

- **What steps need to be taken to achieve your objective?**

  Break each step down into the precise activities that have to be accomplished for successful performance. Large training projects are often too complex to be controlled unless broken down into manageable portions. This is done by building a family tree that specifies the major tasks or sub-projects (often called a Work Breakdown Structure or WBS).

  Once this top-level tree has been developed, the major task or sub-projects are sub-divided. This process continues until a controllable 'work package' is ultimately defined. (A more detailed explanation of work breakdown structures and work packages is to be found below.)

R – Relationships

- **Identify the order of precedence for completing the activities**

  Some activities cannot be started before another has finished. Others may be able to run in parallel because they are not so dependent. Activities that are defined as part of a project will have some relationship with other activities that are part of the same project. Sometimes one activity cannot begin until another has finished. These are known as dependent activities. Together these will determine the minimum possible time in which a project can be completed; the critical path.

S – Schedule

- **Draw up a written plan that shows the range of activities and their relationship to each other**

  A schedule helps communication and can be on an A4 handout for everyone or on an A1 chart for constant visual reference. Estimates of time and resource requirements are fundamental to project planning. They are rarely perfect but can be made with a statement of their likely accuracy, so-called probabilistic estimates. This final phase involves allocating resources against the timescale and preparing for action.

Work breakdown structure

A work breakdown structure (WBS) is an essential part of successful planning, and is an essential activity for any kind of project. In essence it is a simple process, similar to brainstorming:

1. Firstly, the tasks of the project are listed.
2. Who will carry out each task is also considered.
3. Then each task is broken down into the activities which contribute to the successful completion of the task.
4. The tasks are grouped into work packages, which might be the responsibility of one department, a contractor, a subsidiary, or (sometimes) a project team member.

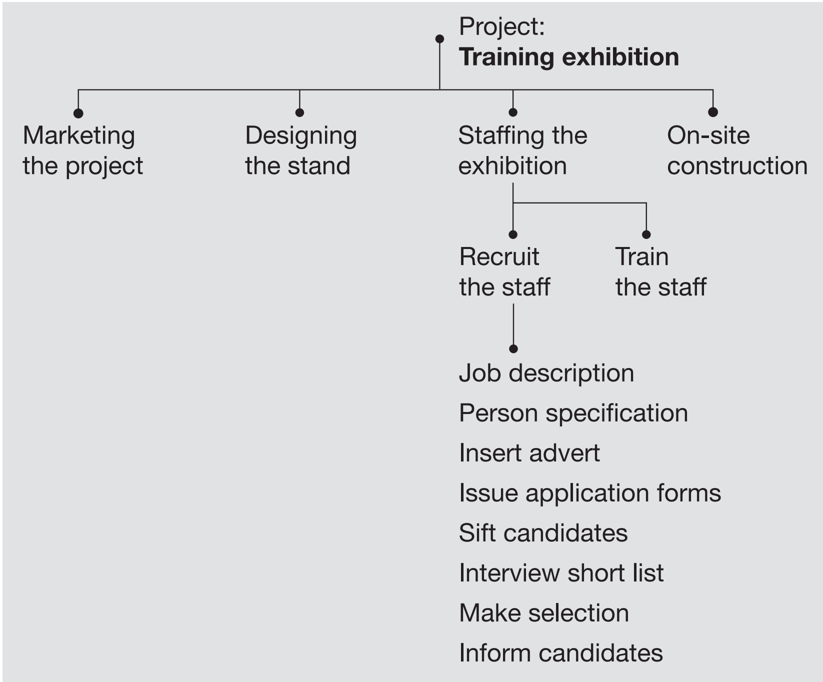
When you complete a WBS you are trying to establish the level of detail that will allow you (as project manager) to do three things:

1. Establish responsibility (who will be accountable for completing the task/activity).
2. Co-ordinate activity (so that things happen at the right time).
3. Measure what is happening (so that you can monitor/control quality and quantity of work completed against both cost and time).

Typically your WBS will look like an organization chart, with responsibilities at the top, tasks next, followed by activities. The trick is to achieve a level of breakdown that is manageable, without being so detailed that administration becomes too onerous.

In a business project it is usual to agree the key parts/phases of a project, and who is responsible for task completion. This can be shown on a responsibility assignment matrix (RAM) which shows graphically who is responsible for what activity.

Having completed a WBS you can then begin sequencing activities.



A work breakdown structure

Activity point

Work breakdown structure

Create a WBS for any training project you are currently involved in starting up.

Gantt charts (Bar charts)

The oldest and still most commonly used planning and control technique is the bar chart. It is sometimes referred to as the Gantt chart as this method of planning was developed by one of the pioneers of scientific management, Henry Lawrence Gantt, around 1910.

Simplicity is its greatest virtue. It is easy to construct. It is also easy to understand and is, therefore, likely to be a useful communication format for all engaged on the project.

It can and should be used to show progress of work through the project. As it is always drawn against a timescale it can be used to prepare a manpower, or any other form of resource, schedule.

The stages required to draw up a Gantt chart are:

A time-line

Draw a timeline across the top and bottom of the sheet. Start with the earliest start date of the first activity through to the date for the completion of the project.

Identify actions

List the key activities identified in your earlier exercise down the left hand edge of the paper. When you write the list start at the top of the page with the initial project task. List the other activities in the logical order and sequence identified from your analysis. Activities that form the basis of a subsidiary task should be grouped together.

Specify duration's

Note down in margin A your estimate of the overall time needed for each task.

Draw the bars

At the appropriate time point for each activity draw a bar that shows its estimated start and finish dates. The bar is positioned at the earliest start date of each activity and the length of the bar shows the estimated duration.

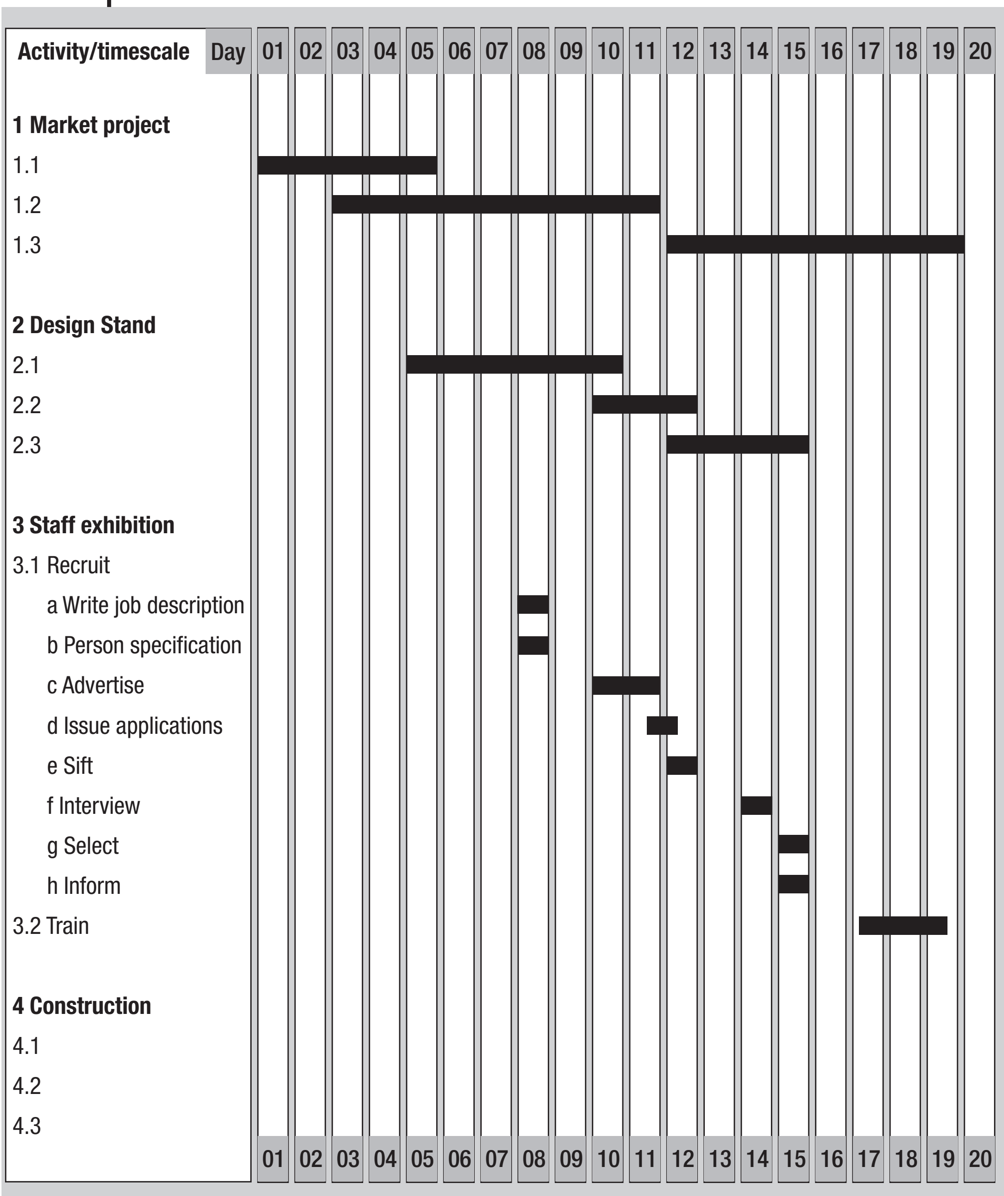
Step back

Review your chart. Have you got the sequence of the activity in the most economical order? The chart should cascade down the page from top left (the start) to bottom right (the finish)

Nominate individuals

For complex projects where you are co-ordinating the efforts of a number of people write down alongside each activity who is going to be responsible for ensuring that stage is completed successfully.

You can draw up the chart on a word processor or spreadsheet. This will enable you to move activities around the chart as their interdependency becomes apparent. A computer-based system will also enable you to easily introduce a new activity or change the amount of time an activity will take. This will avoid the time taken to redraft a hand drawn chart.



A project Gantt chart

A

Activity point

Gantt chart

Create a Gantt chart for any training project with which you are currently involved.

Although widely used, the bar chart has some disadvantages. It is difficult to show relationships properly between activities on complex projects, and this may lead to problems of co-ordinating the work when the project is in progress. Large projects may require detailed planning and control, and there is a physical limit to the size of a bar chart that can be reasonably handled for monitoring purposes.

In recording progress, it is important to remember that there are several criteria that need to be monitored and compared with each other. For example, the bar chart is drawn against a timescale, and the length of the bar is significant in that it represents the time the activity is expected to take.

While the activity is in progress there is a need to record how much time has been spent on that work to monitor it effectively. It can lead to problems, however, if no account is taken of the actual percentage of work completed against planned completion. While 50 per cent of the time allocated to the activity may have been consumed, this is no guarantee that fifty per cent of the work is completed. Some of the deficiencies of Gantt charts can be overcome if you also develop a network analysis diagram that clearly identifies the critical path.

Network analysis diagram

Benefits of network analysis

Network analysis can be used to:

- Decide the sequence in which all work should be conducted.
- Show the logical dependency of one or more activities on another.
- Find the earliest completion time for the project.
- Identify related resource demands.
- Identify those activities that dictate the overall project duration, that is, the critical path.

- Act as a rehearsal of the actual work on paper.
- Give the earliest and latest acceptable start and finish times of each activity.
- Show the dates on which resources will be committed to the project.
- Assess the level of each resource required at each stage.
- Show the dates at which supplies must be available.
- Allow modelling of alternative methods.

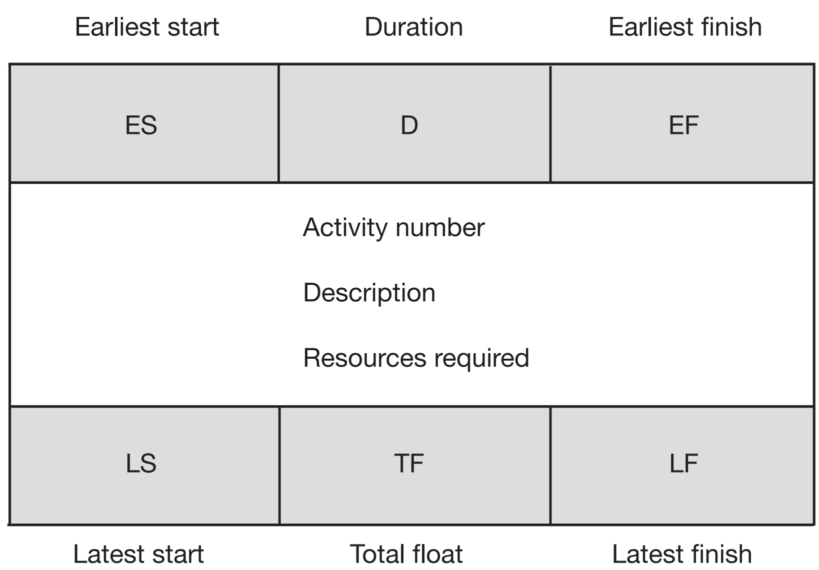
How do I construct a network analysis diagram?

Effective resourcing and control of each activity depends on knowing the:

Earliest start
Earliest finish
Latest start
Latest finish

for all activities

All this information is recorded in the activity data box by using Forward and Backward pass methods. Each box represents an activity and contains all relevant data. (See diagram below.)



The activity data box

Forward pass

1. Starting with the first activity enter zero in the earliest start box – ES.
2. Add duration time to ES value to get earliest finish and enter in box – EF.
3. The EF value becomes the earliest start for the succeeding activity therefore put this in its ES box and continue.
4. When you reach a 'merge' activity (one which depends on the completion of more than one preceding tasks) trace all paths to the activity and put the 'highest' number in the ES box.
5. At the last activity the earliest and latest finish times will be the same value, i.e. the EF figure is also placed in the LF box.

Backward pass

Start with the very last activity.

6. Subtract the duration time of the last activity from latest finish (LF) time to get the latest start and enter this in the LS box.
7. The LS time becomes the LF time for the preceding activity and is entered in its LF box. Continue backwards to the first activity.
8. If you reach a 'burst activity' (one which controls the start of more than one activity) select the 'lowest' value leading back to it. This becomes the latest finish time and is entered in the LF box.
9. When you arrive back to the first activity the LS and ES should be the same.

Total float

10. For any given activity, it is the difference between ES and LS values (or LF and the EF values).

    If the value is zero then the activity in question is critical and unless action is taken any delay will cause the project to overrun its target. It is this figure which will help you identify the critical path.

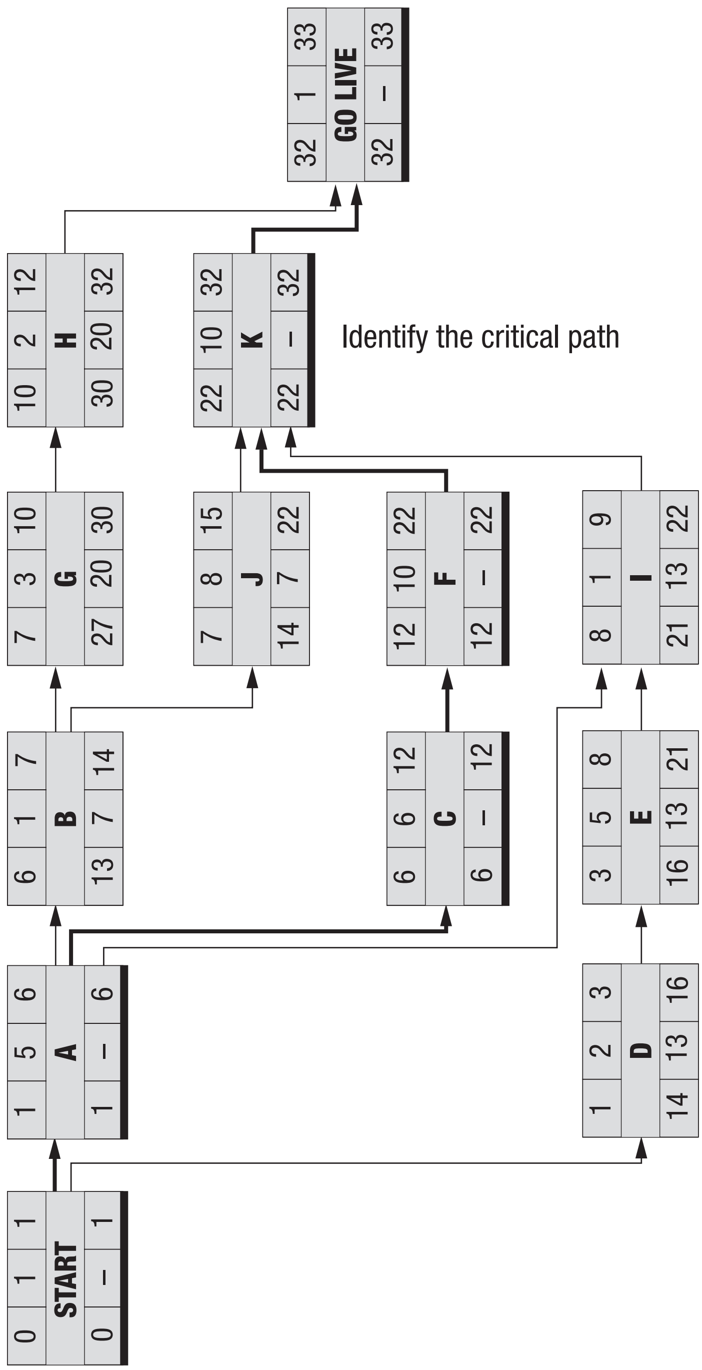
    A positive value indicates the amount of slack time available and is useful for control and resource decisions.

A

Activity point

Network analysis

Create a network analysis diagram for training project you are involved with.



Using network analysis

How can I shorten the time it will take to complete the training project?

Here are some ways you can shorten the critical path:

- Reduce the duration of some of the activities. (Simply allow less time for them.)
- Add more resources to some of the activities. (If you assign more people or equipment, you can often reduce the time required. Be careful, however, since this can increase the co-ordination time required.)
- Allow more hours in the workday. (Allow for overtime or add another shift.)
- Allow more workdays in the schedule. (Allow for weekend or holiday work.)
- Change the relationships of activities. (Instead of performing some tasks sequentially, one at a time, perform them at the same time, in parallel fashion.)
- Use slack time more effectively. (Find slack between activities or 'downtime' for some resources, and 'move up' or plan to complete pending activities during this time.)
- Redefine one or more project phases. (Check to see if some activities contained within a phase are causing the phase to be delayed needlessly; then consider moving these activities to the next phase.)
- Redefine 'done'. (Consider whether some deliverables, particularly interim deliverables such as blueprints, prototypes or drafts, might be defined as 'finished' in a less complete form.)
- Reduce the amount of deliverables that a particular activity produces. (It takes less time to do less work!)
- Reduce the overall project scope. (Eliminate some work products, processes, or deliverables.)

Caution: After you have determined which of the methods you would like to use to shorten the critical path, you should discuss them with your senior management, sponsors and stakeholders. Since many of these methods result in fundamental changes in project structure, you should discuss the positive and negative effects they might have on the project, and obtain sponsor/stakeholder approval.

Identifying and communicating responsibility

Having established what the most efficient and effective stages for each activity the next step will involve you in identifying who does what. It is very important that everyone involved in the training project is clearly assigned responsibility for completing each individual element. If you do not establish this it will be difficult to hold individuals accountable. Confusion will reign over who is to do what. This can lead to some jobs being done twice, by different people, whilst other key tasks may either be missed or only partly completed.

One straightforward way of doing this is to draw up a responsibility assignment matrix which clearly identifies who is going to do what.

Stage one

Write the key activities for the project down the left hand side of the page.

Stage two

Write the names of the people who will be involved on the project across the top of the page.

Stage three

Identify the person with the main responsibility for achieving that activity. (Write M in the appropriate box of the matrix.) Identify if they need support (write S in the appropriate box).

Activity/assigned personnel	Managing director	Marketing manager	Training manager	Personnel officer
1 Market project				
1.1				
1.2				
1.3				
2 Design stand				
2.1				
2.2				
2.3				
3 Staff exhibition				
3.1 Recruit				
a Write job description			M	
b Person specification	S		M	
c Advertise	M	S	M	S
d Issue applications			M	
e Sift		S		M
f Interview	M	M	M	S
g Select	M	S	S	S
hInform				M
3.2 Train				
4 Construction				
4.1				
4.2				
4.3				

A responsibility assignment matrix (RAM)

When drawing the matrix you will need to consider two elements. What needs to be done – taken from the key activities in your WBS – and who will do it. A further useful refinement is to identify not only the person who has the main responsibility to carry out the task (represented on the chart by a capital M), but also the individuals who will be supporting them (represented by a capital S).

Activity point

Draw up a responsibility assignment matrix (RAM) for your training project.

Specify each assignment

One of the features of a training project is that you will have different people working on different activities at the same time. The RAM will help you to co-ordinate all the activities into a coherent whole. But identifying who will do what does not guarantee they will do it entirely to your satisfaction. You may recall examples when you have delegated work to someone or commissioned a job and the end result has been far from what you anticipated or required.

It is all too easy to make assumptions that the other person knows what you expect. The best approach to make sure you get precisely what you need is to discuss the activity you have assigned with each of the individuals concerned.

During this discussion you should:

- Identify the person responsible for the successful completion of that activity.
- Confirm that the activity is appropriate for that individual.
- Set out what is to be achieved in specific, measurable terms.
- Identify any liaison required with other project members.
- Specify the technical standards or regulations that must be followed during the work.
- Specify other quality issues required of the end product.
- Discuss any conflicts in meeting these objectives with other work they have.
- Establish priority between any conflicting objectives.
- Gather information on a realistic timescale for completing the activity to the specification agreed.
- Identify the resources that are going to be required to carry out each activity.
- Estimate how much it will cost to provide each of these resources.

The information gained from these discussions will give a realistic, rather than imposed, timetable for completion. You should ensure that the individuals who have been consulted in this way feel involved and motivated to make a success of what is becoming their training project.

Checklist

- ✓ Positive planning prevents poor performance.
- ✓ Start the planning process by identifying your ultimate goal or objective.
- ✓ Identify all the key steps you will need to take to achieve that objective – use a work breakdown structure.
- ✓ Identify an order of preference for completing the activities. What can run in series, what activities depend on previous actions being completed successfully?
- ✓ Draw up a written plan to communicate how all of the stages link to meet your objective – use Gantt and/or network analysis.
- ✓ Discuss, agree and assign responsibilities with the key players in the project.
- ✓ Monitor your plan and take speedy and effective action to get the action on the critical path back on track.

Chapter seven

Managing training budgets

Introduction

By the end of this chapter you will be able to:

- Identify the key features and benefits of developing a training budget
- Draw up a cost matrix by identifying the key resources used by your training department
- Anticipate your cash flow and draw a cash flow curve
- Take action to rectify any variance between what you anticipated you would spend and what you have spent.

Maintaining control and cost information

There are several reasons why a cost information system is necessary in any training department. The most important, of course, is that there is a legal requirement for organizations to keep a record of income and expenditure.

The way in which accountants require information to be presented, for say, audit purposes, is not always conducive to good training management and decision-making. Attempts should always be made to ensure the design of cost systems allow as far as possible, to facilitate future cost estimating and cash flow planning.

What is budget management?

Accuracy in budgeting is desirable but in reality all that can be hoped for is reliability. The budgeting process involves the use of estimates. These estimates forecast how much money resources will cost over the budget period. The skill is in reliably being able to predict what the money spent will be.

Effective budget management has several important features:

- It should identify the policies that you expect to pursue in order to meet the overall objectives of the organization.
- Management responsibilities have to be clearly defined in both quantitative and financial terms.
- Individual budgets lay down a detailed plan of action for a particular sphere of responsibility.

- The data should be formally documented and cover a defined period of time.
- Managers have a responsibility to adhere to their budgets once they have been approved.
- Throughout the agreed period actual performance is constantly monitored and compared with the budgeted results.
- Departures (i.e. differences) that are unaccounted for should be the subject of investigation.
- Corrective action should be considered if the actual results differ from the budget.

A budget is like a ruler; it is a financial tool that we can use to measure how much money we are planning to spend and then use it to compare how much money we have actually spent as compared with our original estimate (the budget).

What are the benefits?

- **Planning:** Plans specify in detail what will be done, how, where, when and by whom. This will enable you to ensure the efficient use of scarce resources and that you are putting your efforts into doing the right things. Budgets help provide a formal framework which forces us to think about our future.
- **Communicating:** The budgeting process will present an opportunity to discuss ideas with colleagues. Staff can make their needs known to the manager on what's required to achieve organization objectives. Each section will clearly know how much they can spend over what timescale as they work towards their own particular target.
- **Controlling:** You can make sure that the finances are controlled properly so that the section meets its financial targets, stays on track and ensures the organization as a whole survives. As the budget period unfolds the budget becomes a point of reference to remind us of targets and progress.
- **Decision-making:** At various stages throughout the year you will need to sit down and decide on the viability of the budget. Cost projections will be a prime factor in the decision on what to do next. If costs greatly outweigh the benefits the section will be unlikely to survive.

- **Co-ordinating:** You will be able to keep the team in balance and ensure that all those concerned are moving forward harmoniously and that one part of the organization is not spending all the money.
- **Comparing:** As the financial year progresses you can compare actual costs with planned performance and intentions. Doing this on a regular basis will mean your organization has detailed, first hand knowledge on progress and any problems that may occur.
- **Correcting:** The budget will enable you to consider what corrective action is needed if things are going awry. What and where did our original forecasts go wrong? What corrective action is needed? How will this affect costs allocated to other resources? Can you correct and still come in on time and budget?
- **Motivating:** By setting an agreed target you can motivate your team to work towards it. Encourage them to make small adjustments to keep the budget on track. Some organizations offer a direct incentive in the form of performance related pay. Make sure you build in a safety margin and budget for this, or you may loose any advantages and end up with an overall loss.

Draw up a costing matrix

Estimating costs can be a difficult process. Historical figures may give an indication but they are unlikely to be accurate. For a new training initiative there may be no precedent to base your estimates on.

One of the first steps in making a reliable estimate is to identify the major activities involved. You will need to identify the resources that will be required and then the costs for providing each. A total cost estimate for the training project can then be prepared by totalling the costs for each element. Budgets can then be prepared for each element and for the project as a whole.

The detail required for costing the resources will depend on the nature and scale of your business procedures. For small internal training projects you will probably only need to account for any additional costs incurred (e.g. hiring equipment, buying materials, hiring consultants or extra staff or other expenses). For larger or external projects your costing will have to be more detailed and may have to show indirect costs (e.g. these could include such indirect materials as office stationery, labour costs such as cleaning or even indirect expenses such as lighting, heating and rent). Whatever the detail you choose to use it can be quite easy to underestimate what is involved.

When you have prepared an estimate of the overall expenditure you will be able to draw up a cost matrix. The cost matrix is a diagrammatic way of representing material to make it more easily understandable by all concerned.

To prepare a cost matrix you will need to identify the major categories of resources you will need for each item involved. Once this is done you will then be in a position to make a more accurate costing.

What are my resources?

Resources are defined as: any people, equipment and materials needed to execute a training project? Resources may take all sorts of forms, depending on the needs of the project and the industry in which the training project is executed .For example:

- Human resources include any suppliers, contractors or vendors, as well as all manner of professionals, craftspeople and other specialists.
- Equipment resources can include such things as construction cranes, computers, copying machines, and media production equipment.
- Materials can take forms as divergent as lumber, office suppliers, computer disks, or photographic film.
- Resources may be salaried, rented by the hour, or purchased outright.

The bottom line: The training manager must identify, plan for, and manage all resources needed to get their job done.

Typical organization costs

This is not an exhaustive list but is designed to illustrate many of the expenses incurred by any organization.

- People – Cost of employing own staff or costs of employing additional temporary staff.
- Machinery – Any equipment that is removed from other work or has to be bought in (hired or purchased).
- Materials – Any items used from your own stocks or bought in.
- Premises – Costs you will have to bear to buy or rent premises.
- Delivery – Costs involved in getting your products to the marketplace. These could involve having your own transport or postage and packaging.
- Marketing – Costs involved in publicizing your product. These could include advertising or exhibitions.
- Professional fees – These costs could cover such areas as legal costs, accountancy and audit fees. Many organizations buy in consultants to provide specialist expertise to augment your staff's competence.
- Insurance – Again could cover a wide range of expenditure such as buildings, contents, key worker, professional and public liability
- Administration and overheads – This category could cover a wide range of expenditure depending on the complexity of the business – the costs of providing management and support services, National Insurance, pension and staff benefits, light, heat, cleaning and servicing the buildings.

Activity point

A

Review our list. Tick all that apply to your training department. Identify below any additional costs that we haven't included on our list.

- People
- Machinery
- Materials
- Premises

- Delivery
- Marketing
- Professional fees
- Insurance
- Administration and overheads
- Additional costs
- ______________________________
- ______________________________
- ______________________________
- ______________________________

How do we determine costs?

In the majority of situations how you determine costs will be a straightforward process. It could be the latest quoted price from a supplier. In some organizations the purchasing procedures will require several prices are obtained through competitive tender.

Where services are being costed the provider may only be able to provide an estimate until the actual work has been completed (although fixed price quotes are becoming more common). Alternatively, service costs and supplier costs may be fixed because they are being supplied by another section in the organization.

A common way at arriving at a figure is to make a historical review of how much goods and services cost in the past. We advise you ask yourself the following whenever you are adopting this approach:

- How close a prediction was last years budget?
- Did we under or overspend?
- How typical was last year?
- Were there any no-repeating occurrences?
- How typical will next year be?
- Can we predict any unusual events?
- What allowance should we make for inflation from last year?
- Are this years activities necessary in their current format?

- Can they be reduced or eliminated?
- Are there any alternatives?
- What will they cost?
- How will any changes affect the quality of our services?
- Shall we build in a contingency fund to allow for the unexpected?

Activity point

A

Spend a few moments reviewing the above questions in relation to your training department's spending proposals.

Once you have identified the major categories of your costs you will then be able to draw up a cost matrix. The cost matrix is another diagrammatic way of representing material to make it more easily understandable by all concerned.

To prepare a cost matrix you will need to identify the major categories of resources you will need for each item. Once this is done you will then be in a position to make a more accurate costing.

Activity Totals	Resources	Manpower	Machinery	Materials	Premises	Overheads
Marketing						
1.1 Marketing material	500		500	250		1150
1.2 Exhibition material	500		1500	250		2250
Design stand						
2.1 Design stand	500	250	150			900
2.2 Stand materials			1500	1000		1800
Staff exhibition						
3.1 Recruitment	1500		500			2400
3.2 Training	500	150	500		500	1800
Construction						
4.1 Deliver	150	250				400
4.2 Assemble	500			150	350	1250
4.3 Services	150	150				300
Total cost	4300	800	4650	1650	850	12250

Cost matrix for a training exhibition

Once you have identified your project costs you will need to break them down by type of resource for each activity and then set them down in a detailed budget.

A

Activity point

Draw up a cost matrix for a training project which you are working on.

Profiling the cash flow

Having produced a detailed budget for the work the next step for more complex and lengthy training projects is to produce a cash flow profile.

The profile is used by the training manager to illustrate when the money will be spent. You will need to identify how much money will be paid out and when, and how much money will come in and when. This is known as a cash flow profile. It provides details of the various flows of cash on a daily, weekly or monthly basis. The starting point for this exercise is the cost matrix. You will need to look at each item of expenditure identified and estimate when you will need to spend the money.

Cash flow forecasts have several uses for the training manager. It will help you answer the questions:

- What is going to happen to the money over the next 12 months?
- Where is it going to come from?
- What is it going to be spent on?

- When will the money come in?
- When will it go out?
- Will I have enough money?

The precise period used in the cash flow forecast will be determined by different organizations' needs and their budget procedures. These could be on a daily, weekly or monthly basis.

	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6
Monthly payments						
Manpower		1000	1500	1000	1500	1000
Machinery	4000					
Materials	4000		1500	1000	500	
Premisis		1000		1000		1000
Overheads				1000	500	500
Total monthly payments	8000	2000	3000	4000	2500	2500
Cumulative payments	8000	10000	13000	17000	19500	22000

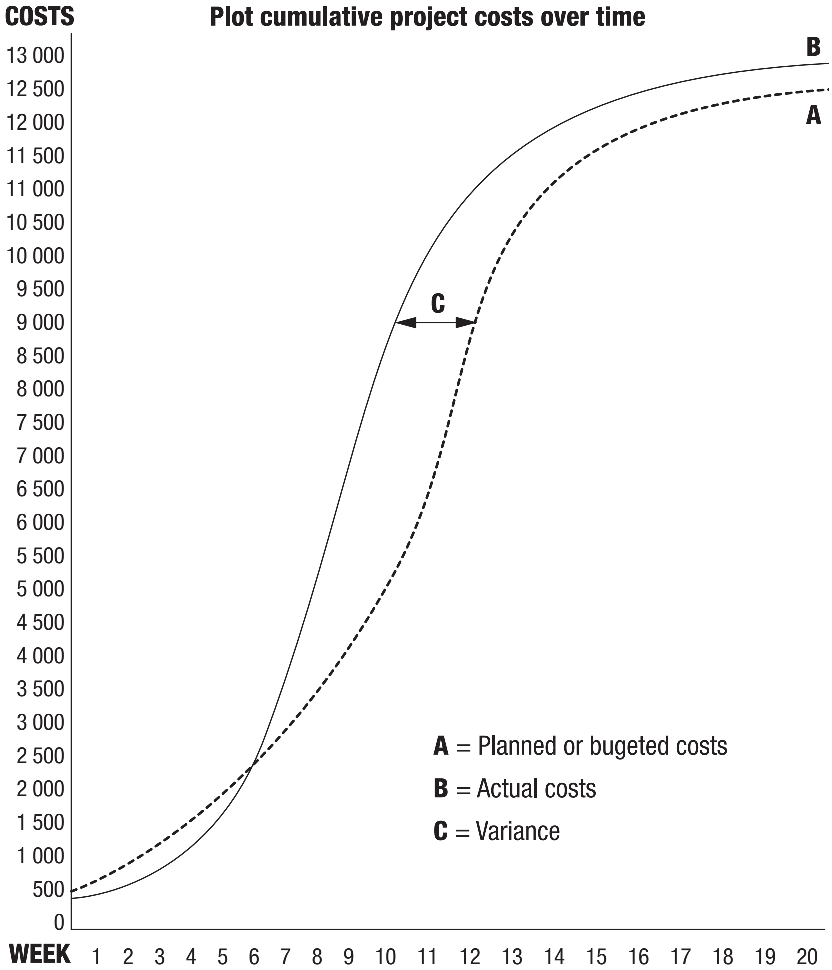
An example of a cash flow profile

Activity point

Take time out to draw up a cash flow profile for your training department or a training project you are involved in.

Producing a cash flow curve

Having profiled your budget and identified the timings of the various cash payments and receipts set out in your cash flow profile, the next step is to produce a cash flow curve.



Cash flow curve – an example

Once a cash flow profile is made up the information is then plotted on a graph showing the anticipated expenditure against time. Although the type of activity and financial arrangements will determine the precise shape of the graph adopted (e.g. supplier payment terms, wage payment intervals, incidents of any on account receipts, etc.) a curve shaped like an S is usually found to emerge (hence the alternative name 'S' curve).

These curves are used to graphically identify the cash flows anticipated. If actual cash flows are recorded then it will be possible for you to identify whether you are under or over budget at any given stage. In addition, other curves can be plotted, thereby monitoring the project's cash flow against progress, purchase commitments etc. In a well-managed department the cash flow curve should be to the left of progress and commitment curves until the completion of the project or end of the year.

S curves provide a quick view of progress to the training manager once the project is underway. You are able to record actual expenditure to date on the graph. This will enable you to identify any variance between what is actually happening compared to what was predicted to happen. At that point you can make a decision about what action you want to take. But first you will need to profile the budget and draw your curve.

A

Activity point

Produce your own cash flow curve using the data you have previously assembled in this chapter.

Explore the variance

One of the main benefits of a cash flow curve is that it helps show up discrepancies between planned and actual expenditure. What you will also need to keep an eye on is a figure called the variance. This is a term used to describe the difference between the original budget and the actual costs. These figures (plus the remaining planned costs to complete the project) will give you the estimated cost of the project at completion and provide you with your best indicator on whether you can bring the project in on budget or not.

Question: If you are faced with a situation where you have worked out the figures that show a training project is running well under budget, is this a case for joy or concern?

Answer: The answer should be neither – it is a case for further investigation.

One possible answer is that the individuals responsible for each part of the activity have found cheaper ways of achieving their objectives and the project will make a bigger profit. But what if, in order to cut costs, they have gone for inferior quality products which may store up problems later costing more than the original savings to put right. Furthermore, maybe the project is well behind schedule and the money hasn't been spent because the work hasn't yet started.

The figures are only the start of the process, they will not tell you the answer. You will need to find out what they are telling you.

Consider what actions you could take to rectify the situation. These could include:

- Raise prices (but beware, the affects this may have on sales).
- Pressure debtors to pay earlier.
- Defer production to match sales.
- Reduce materials purchased.
- Defer the purchase of new machinery (could you continue running with the old equipment).
- Look at leasing rather than out-right purchase.
- Review your labour and administration costs. Could you subcontract or use agency staff which may reduce your overheads.
- Increase your production facilities (longer run, overtime, extra machinery) if sales continue to rise.

Every budget item should be re-evaluated, not only after an exercise like this, but also after each budget period. Training Managers need to ask questions such as:

- Is the activity still necessary in it's present form?
- If not, can it be reduced or eliminated?
- What are the alternatives?
- How much do they cost?
- What impact will change have on the quality as well as cost of existing services?

Once you have decided on the most effective course of action you will then be able to prepare A revised budget that shows a positive cash flow.

Budget reports – a management tool

The revised budget can be broken down into two columns. One will show the budgeted expenditure per month (or whatever period appropriate for your organization). This will be reviewed against a second column that shows actual expenditure. The columns provide a monthly and final total that highlights the variance between the two figures.

Getting your budgetback on track

There are several options you could take to get your budget figures back on track:

1. **Do nothing:** the gap between actual and planned costs may be too small to worry about in some circumstances.
2. **Revise the budget:** all plans are based on guesswork and estimates that may be incomplete. The revisions will be based on more up to date information.
3. **Reduce specifications:** substitute the quantity or quality of resources required by using cheaper material for future activities.
4. **Substitute:** use your own internal staff (provided they have the necessary skills and time) rather than continuing to use expensive external contractors.
5. **Re-negotiate your budget:** you may need to go back to the negotiating table to negotiate a budget increase with your client as a result of the information.
6. **Delete:** desirable but less than essential activities or resources from the remaining project activities that will save you money.
7. **Offer an incentive:** a bonus to project staff who come up with suggestions to work more effectively to get project back on track.
8. **Manage:** one reason for variance is that the project manger is not keeping in touch with what is going on. Set up regular team meetings and regularly 'walk the job' to inspect the quality of the work to avoid future problems.

A

Activity point

Review your existing budgets. Are they on track? What remedial action do you need to take now?

Checklist

- ✓ Identify all the resources used by your training department.
- ✓ Are the costs being borne from central finance or will they come out of your budget?
- ✓ Take care with historical information. How relevant is it for this budget period?
- ✓ Draw up a cost matrix for any training project you are working on.
- ✓ Identify when money will flow in and out of your department and draw up a cash flow curve.
- ✓ Monitor actual against planned expenditure and act quickly to investigate any variance.
- ✓ Take positive action to get your budget back on track.

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Chapter eight

Choosing the right learning opportunity

Introduction

What is learning?

What's your experience?

What's your learning style?

Identifying and improving your learning style

Learning and development opportunities

Checklist

Introduction

By the end of this chapter you will be able to:

- Define what is meant by learning
- State the four main stages of the learning cycle
- Identify your preferred learning style
- Develop an action plan by choosing from a number of learning and development opportunities

What is learning?

"A relatively permanent change in behaviour that occurs as a result of reinforced practice and experience."

A Huczynski and D Buchanan, *Organisational Behaviour,* Prentice Hall, 2000

One of the challenges for training managers is how to get their target audience to change their behaviour in order to perform better and to meet the challenges and ever changing demands of their job.

A permanent change of behavior is the main outcome you are trying to achieve in any learning activity, it's what developing and improving are all about. Even if when they return to work the tasks attempted are not performed well first time, the training should have started to equip the individual job holder with improved skills and knowledge. This will help them to choose a more appropriate approach next time. Persevering with continued development will mean that, eventually, the job holder will be able to select the most relevant behaviour and action in a wide variety of changing circumstances.

But how do you ensure that the job holders *'set themselves up for success'*. No one likes to make mistakes and, by choosing the wrong type of learning opportunity, this is what you may be doing.

In order for you to help them to make the best choice of learning opportunity you will need to consider the learning preferences of the job holder and be aware that if your preferences are different this can affect your recommendations, and the learning events and opportunities you will be inclined to support.

It is generally accepted that experience is a critical factor in learning. At some stage we all have to get out of the classroom, put down the book and have a go. Some people will however learn better from some experiences than others.

If both the training manager and the job holder recognizes how each learns best they will be able to anticipate what type of difficulty the job holder may have from a particular project. Identifying the job holders' strengths and weaknesses as learners will help you choose appropriate events, and you will also be in a better position to make sure that they gain the maximum from them.

What's your experience?

A

Activity point

Think back to several events where you have learned a great deal and write down what these events were.

Events where I learned a great deal:

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ______________________________

6. ______________________________

Now turn your attention to occasions where you didn't learn a great deal and came away dissatisfied. Again make a note of the events.

Events where I learned very little:

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

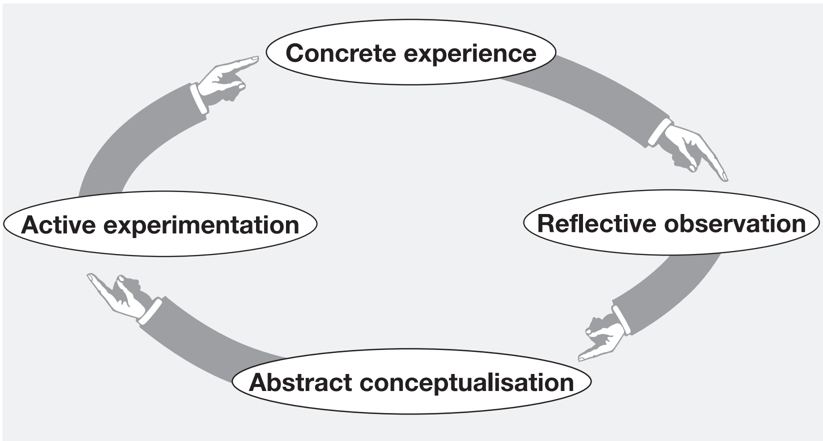
5. ______________________________

6. ______________________________

Discuss your experiences with a colleague. Identify the underlying factors that either made it a success or a failure. What are the common factors which made some learning experiences successful and others less so?

Kolb's learning cycle

Adapted from *Experimental Learning,* David Kolb, 1984, Prentice Hall.



Kolb's learning cycle

David Kolb developed this popular model on how we learn. He uses it to describe learning as a cycle. If the steps are followed in sequence the desired learning will be produced. The stages involve us in doing something (concrete experience), stop to think what has happened (reflective observation), our thinking helps us to develop or fit this into a model or theory (abstract conceptualization), we then decide how to test our conclusions and develop a plan to improve our performance (active experimentation). This leads us back to the start of the cycle, which hopefully becomes a learning spiral.

How do your learning examples fit in to Kolb's model?

One of the chief benefits from the model is that it demonstrates that an individual can complete all stages in the circle in a variety of settings – not just the training room. Much classroom-based training can over-rely on theatrical trainer inputs and is usually devoid of opportunities to put these into practice to see how they work for the individual job holder.

One of your main functions as a training manager is to provide your job holders with fresh experiences and then facilitate these opportunities to make sure they complete the circle and gain maximum benefit from the opportunity.

Many people often use the learning cycle intuitively. They learn from events in this way without being conscious they are using it. The benefits of having this model is that you can use it either reactively or proactively.

You can use it retrospectively after any event that has just taken place – this has been called 'learning on the hoof". The workplace is full of events that provide marvellous opportunities for learning. When one has occurred you can use the model to help them to stop to take stock of what happened. A good training manager makes a habit of helping the job holder systematically think about past events, analyzing what was learned from them and anticipating what they could do differently next time.

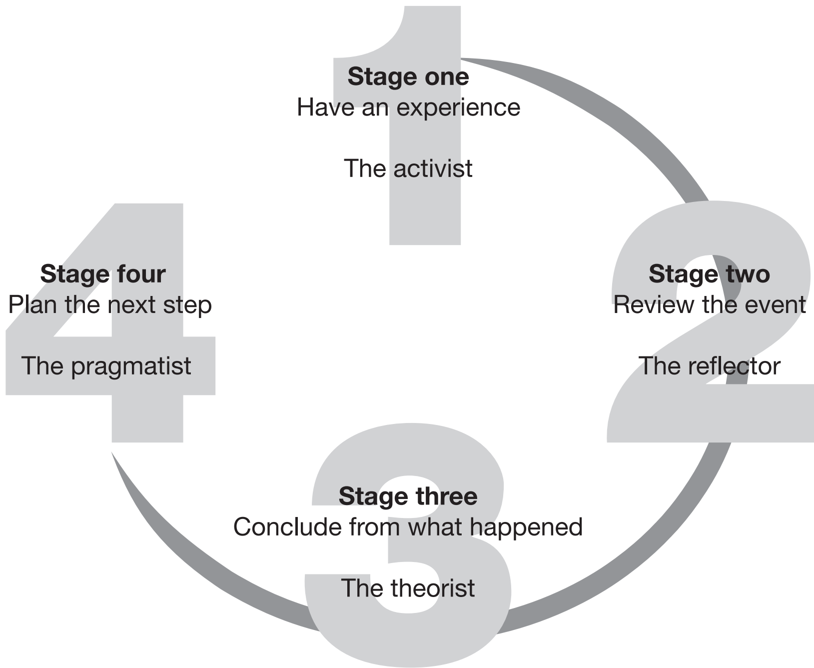
Remember that it is equally important you do this when there has been a positive outcome, not only when something has gone wrong.

The training manager can also use Kolb's model proactively. You take a positive approach before any event, spotting it as a potential learning opportunity and planning how best the job holder will learn from the experience, as well as reviewing it afterwards.

What's your learning style?

When it comes to learning we all have different strengths and skills. This will mean that we will tend to enter the cycle at different stages and will be stimulated more in one stage than others. This is the result of a number of circumstances such as how we were born, the environment we grew up in and work and the various experiences, both positive and negative we've had, mean that individuals develop a unique learning style.

Two British psychologists, Peter Honey and Alan Mumford, have identified four learning styles that complement the stages of Kolb's model.



Honey and Mumford's learning styles

Adapted from *The Manual of Learning Styles*, Peter Honey and Alan Mumford. Available from Dr Peter Honey, Ardingly House, 10 Linden Avenue, Maidenhead, SL6 6HB.

The activists

Activists enjoy the here and now and are dominated by current experiences. They tend to relish short-term crises and firefighting. Whilst they rise to the challenge of new experiences they soon get bored and dislike implementation and long-term consolidation. They enjoy working with others but tend to dominate, doing too much themselves and hogging the limelight.

They tend to learn best from relatively short activities that involve immediate involvement in active tasks. In the learning cycle they are very ready to enter the first stage but less ready to conclude and review from this. They tend to be intuitive learners who dislike having to listen to long lectures of how to do things, or follow instructions to the letter.

The reflectors

Like to stand back and observe, to collect data and think things through. They are careful and methodical and analyze things carefully before coming to any conclusions. They can be over-cautious, analyzing a situation from all possible angles to try and eliminate all the risks.

In the learning cycle they are generally more effective in the review stage and tend to adopt a more reactive approach. They will prefer to take a back seat in discussion and enjoy listening to others before making their own points. They tend to do best in learning activities where they can indulge in painstaking research before acting, and dislike if they are forced into the limelight being made to act as a leader or make a presentation when they don't have time to prepare.

The theorists

Like to analyze and synthesize. To produce models and systems which tidy up disparate facts and fit them into rational schemes. They like to work through situations step by step. They tend to be perfectionists and reject anything intuitive or brash that doesn't fit with their logical approach.

In terms of the learning circle they perform best in the concluding stage and can learn from both the reactive and proactive types of learning. They are similar to reflectors but place a greater emphasis on a need to place their learning in the context of a model or theory. They may feel uncomfortable if they are out of tune with the other participants, if the activity is unstructured or presented in a disorganized way or where they are not intellectually stretched.

The pragmatists

Are interested in experimenting by applying new techniques. They are the type of person who return from courses and want to try out the new ideas straight away. They are most comfortable with things that look as if they are going to work and tend to reject ideas without any obvious application. They like to get on with things and act quickly and confidently and have a tendency to opt for the first expedient solution.

In relation to the learning cycle they are attracted to the planning stage because this addresses practical action. They have some similarity with activists but differ in the extent to which they learn best when they can see a clear link between the subject and a work-based problem. They tend to be suited to the proactive approach that complements their bias for planning. They need events where they are given the opportunity to try skills out and receive feedback on their effectiveness, but will be turned off by purely theoretical learning or where they can see management or political obstacles to putting what they are learning into practice.

A

Activity point

Rate yourself against each style on a scale where 0 = never use to 10 = always use this style to exclusion of everything else.

Activist	**0**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
Reflector	**0**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
Theorist	**0**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
Pragmatist	**0**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**

Identifying and improving your learning style

There are a number of ways of identifying an individuals' learning style:

- Ask the individuals about their own experiences, from which did they learn most? The previous exercise in this chapter should help to identify events that give a clue to their preferred style.
- Ask for the views of their colleagues, mentors or previous managers.
- Assess the indications that you can draw from the results of any personality questionnaires.
- Use the results of observing them in a wide variety of work based learning events.
- Review how effective they reported any external learning events. Probe their views to establish links with learning theory.

- Have them complete a learning style questionnaire (either Honey and Mumford's LSQ and/or Kolb's Inventory).
- Once identified there is no magic formula for improving your ability to learn. Our style develops over time and is the result of a complex set of variables. But knowledge of a 'problem' can help us start to overcome it. The model reminds us of that useful management technique:

  Plan ▶ Do ▶ Review

Which many managers apply intuitively? Being aware there may be a gap, or we go too quickly through that part of the cycle helps us identify an area for improvement. For example if you are now aware that you are reluctant to spend time learning about underlying concepts it may be worth making an extra effort to learn about the theoretical or academic background to management issues.

By developing a more all-round approach they will be able to maximize their learning from a wide variety of events and situations, rather than being restricted to one or two particular types.

Identify the opportunities

The learning style of the job holder can play an important part in choosing the relevant opportunity but there will also be other factors such as:

- The precise nature of the need.
- The timescale in which they need to develop the skills.
- The costs involved.
- Do you have the facilities required or the individuals who can pass on their knowledge?
- Other events taking place in their section or organization.
- Recognizing that an opportunity has arrived.

Far to often managers view staff development as something that is done by the training department and sit patiently waiting for the arrival of the in-house brochure. This type of training is often called 'menu driven' as it depends on what's available. The proactive manager looks for opportunities both off and on the job, and with some lateral thinking may even be able to identify and encourage out of work activities that have a beneficial spin off in developing work-based skills.

A

Activity point

Write down a list of some opportunities that may occur for learning and development in your organization.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

Compare your list with our choices.

Learning and development opportunities

21 work-based activities for developing your staff:

1 **Coaching:** Have the job holder act as a coach to one of their staff or colleagues.

2 **Delegation:** Remember this involves delegating a real part of your job, not merely allocating a task.

3 **Project work:** Particularly relevant when the individual needs to develop a skill which is not part of their current job.

4 **Job exchanges:** Can be organized informally within your section to cover for sickness or holiday leave etc.

5 **Secondments:** A more structured version of job exchanges, usually for longer and often involving other departments or outside organizations.

6 **Deputizing:** Good practice for individuals in line for promotion or wanting to gain management skills.

7 **Shadowing:** Accompanying and observing manager or other team member.

8 **Training delivery:** Planning and running an in-house training event. Either reinforce or learn a new subject.

9 **Mentoring or buddy schemes:** Gain experience, knowledge and feedback from others either up or down the line.

10 **Committee membership:** A standing committee or special event. Gives an insight into procedures and politics.

11 **Hot-line:** Manning a telephone response service, giving advice on unusual or difficult situations.

12 **Writing reports:** Involves preliminary research into a topic. Opportunity to develop analytical and communication skills.

13 **Making presentations:** A useful follow-up to report writing. Develops communication skills and defending your case.

14 **External representation:** Acting as an ambassador for the organization at an external event. Could also involve making a presentation.

15 **Product champion:** The section's representative who will learn and be responsible for implementing a new product or procedure to your department.

16 **National forums:** Representing the organization on a national body.

17 **Professional representative:** Representing your specialism on internal or professional bodies.

18 **Trade union representative:** Acting for other members on local or national meetings.

19 **Study visits:** Learning and reporting back about best practice in other organizations.

20 **Trade exhibitions:** Regional, national, specialist. Opportunity to update on new products or services.

21 **Vocational qualification:** A work-related professional course combining qualification with work-based projects.

A

Activity point

Consolidation activity

Look at the lists produced and identify two opportunities you could use in the next month.

These should be:

1. A learning opportunity you can use for a key member of your staff in one of their priority development needs.
2. A learning opportunity you could use to develop one of your own development needs.

Activity for staff development:

Activity for self-development:

Checklist

- ✓ Effective learning involves participants moving through a four-stage circle. Do you know and understand each stage?
- ✓ Our own experience as learners may dispose us towards having a preference for one or more learning styles. Do you know your preferred style? How might this affect your choice of learning opportunities, for yourself and others?
- ✓ There are a wide range of opportunities that will give individuals a choice to match their preferences and style. Monitor and keep your knowledge of the range of opportunities on offer up to date.

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Chapter nine

Selecting the right trainer for your training department

Introduction

The purpose of this chapter is to demonstrate that effective selection relies on using a full and careful specification for the job to assess possible candidates. To provide clear guidelines that will enable you to produce effective specifications for any training post.

People are traditionally regarded as an organizations most valuable asset:

- Without people our organization couldn't function
- The quality of our people determines how well our other resources are utilized
- Effective people can often make up for a shortfall in other resources
- Our people are our source of contact with our customers who will believe what we do rather than what we say we will do
- People are (probably) our most expensive resource.

This last point will almost certainly be true in service organizations when pay, pension and ancillary costs are totalled.

Effective selection of candidates

Think for a moment about the costs to any organization of *having the wrong person in the job*.

Typical costs would include:

- Increased supervision for underperforming staff
- Disaffected customers
- Stressed fellow team workers who have to shoulder larger burdens
- Higher staff turnover
- Increased recruitment costs as replacement has to be found.

The CIPD have reported (in 2006) that the average recruitment cost of filling a vacancy for senior managers' is £10,000 rising to £18,000 when the costs of vacancy cover, recruitment, selection, training and induction are added to advertising, agency or search fees.

http://www.cipd.co.uk/subjects/recruitmen/general/recruitretnt.htm?IsSrchRes=1

Failure to devise and implement an effective recruitment and selection policy is the most common reason for having the wrong person in a post. Time spent on effective recruitment can be costly, but is nowhere near the costs to the organization from having recruited the wrong person.

A wide variety of projects into the effectiveness of the average selection interview – as summarized by Mike Smith of Manchester University – have found it to have little reliability and poor validity, as an accurate method of selection. Ratings for the typical interview are usually to be found around the 15% mark.

The results for organizations in recruiting the wrong person for the job are numerous, varied and often expensive. For most training managers who don't have access to psychometric tests or assessment centres, the selection interview remains the best selection method available.

How can you improve this low accuracy rate and ensure that you recruit the most suitable candidate for the job? Well, the same experts have indicated that, by structuring the interview, particularly by using a formal method of job and person analysis, you will be able to increase your ratings by more than three times to success rates of over 60%.

Bias and distortion in selection interviews

First examine some of the most widely recognized pitfalls of typical interviews, as knowledge of these may help you to avoid them.

We all naturally evaluate information as we receive it. This is part of the nature of communication between two people. However, research has shown that a variety of factors can affect the ability of the interviewer being able to make accurate and unbiased judgements and decisions in the interview. These include:

- Lack of preparation: the selectors often have no clear idea of the knowledge, skills and abilities to do the job under review. They often rely on their own pet theories or a gut reaction that the candidate is the right type.
- Poorly structured interviews: because of a lack of a clear profile of the requirements to do the job, the interview often proceeds in a haphazard manner.

- Candidate contrast: assessments come from contrasting candidates with earlier interviewees, rather than against any objective performance criteria. Because the candidate gives a virtuoso performance at the interview it doesn't automatically prove they have the capabilities to carry out the duties successfully.
- Prejudices and stereotypes: the variety of the candidates attributes are simplified and distorted by the inability of the selector to recognize relevant attributes. There is a tendency to focus excessively on a general picture of 'a good employee' and to ignore or not to have defined more specific and pertinent qualities. Judgements are often excessively coloured by qualities of a candidate that are attitudinally, sexually, racially or culturally similar to the interviewers. This is known as the 'halo effect'.
- Timing of decisions: there is a tendency to come to conclusions early in the interview and stick to them. Some research points to an average decision time of less than 4 minutes. The selector then interprets subsequent information to fit their early impression.
- Accuracy of recall: because of a lack of interview structure and note-taking, selectors are not good at recalling accurately what they have heard in the interview and make different interpretations of the selection data.

How to overcome the problems

There are three inter-related approaches that can help them as selectors to overcome these problems and raise the success of their interviews to more acceptable levels. They are:

A systematic approach

Adopt a structure for all stages with the use of an interview guide and evaluation form.

These are based on a job and person specification that clearly identifies the prime attributes for the successful performance of the job.

Question technique

Use appropriate questions throughout the interview. Ask open questions and use supplementary probes that focus on the facts to enable you to forecast future performance.

The questions you ask and your interpretations of the answers should relate only to those requirements that are necessary and justifiable for the effective performance of the job.

Suspend judgement

Develop a self-awareness of the stereotypes and prejudices that we all have.

This should enable you to suspend judgement during the interview, to seek out and evaluate information objectively throughout, comparing it with the agreed specification and avoid jumping to conclusions based on personal biases.

Set yourself up for success

The training manager can only succeed if they have full, accurate and unbiased information about the specific attributes required for the particular job.

We will now guide you through the necessary stages that will enable you to make sure you can carry out a successful selection interview. There are three stages:

Stage one – job specifications

Every training post should have an up-to-date job description. This will enable you and the employee to know exactly what their roles and obligations are.

For selection purposes this needs to be expanded into a job specification. The exact format of the specification will depend on the purpose for which it is being used. For example, one for internal selection may not be as detailed as one for external recruitment.

Essentially the job specification is a detailed statement of:

- The physical and mental activities involved in the job.

- The purpose, responsibilities and relationships involved in the post.
- The physical and economic factors that affect the job.

To be able to produce an effective job specification you may need to gather information from various informed sources. Once you've gathered the information you should set it out under the following headings:

1. Identification of the job

Current job title, department, division etc, location.

2. Purpose

The purpose of the job and how is it to be achieved. Key job objectives clearly stated and quantified if possible. The duties involved and the methods by which they are carried out.

3. Responsibilities

Responsibilities for which resources, for whom and to whom.

4. Relationships

Whom the post holder will liaise with. The relationships that will influence the achievement of objectives, both internal and external.

5. Physical conditions

Where and how the work is performed. Whether it is sedentary, active or a mixture. Any potential accident or health risks.

6. Social conditions

If group work is involved, what social pressures and influences are there? What types of people will be contacted? Who initiates the contact?

7. Economic conditions

Salary range, increments, pensions, other benefits, car, relocation expenses.

8. Promotion prospects

A realistic assessment of the potential for career progression and the opportunity or necessity to transfer to other locations.

The job specification forms the basis for constructing an effective advertisement and identifying the essential personal requirements necessary to perform the job. It is the first stage of a blueprint of the successful candidate.

Activity point

Produce a job specification

We have reproduced a sample job specification for a management training tutor.

Example: Management training tutor

1. Identification of the job

Management training tutor in personnel and training branch. Located in Luton, Bedfordshire.

2. Purpose

To provide training to all levels of management throughout the organization by providing course room training, distance learning (via email), workshops and outdoor adventure centers as appropriate.

The job will involve the development of new courses and altering existing courses to meet current demands. This will involve the complete cycle of conducting training needs analysis, design and delivery of training through to evaluating the outcomes.

3. Responsibilities

The post holder will be responsible to the senior tutor and will have responsibility for two trainee tutors and a support team comprising three clerical officers and a copy-typist. The job will also include responsibility for controlling the budget for training consultants, aids and equipment (approximately £75,000 per year).

4. Relationships

The post holder will be required to liaise with and train managers at all levels within the organization from Board to front-line), to liaise with training consultants and outside training organizations. To work closely with fellow trainers on the training team (12 in number) as well as the training centre administrative team.

5. Physical conditions

The work is carried out at the Luton center and various locations throughout the UK. It is envisaged that 66% of the time is spent delivering training events and that this time is split approximately 60/40 between Luton and other UK locations. A clean driving license is essential. The remaining 33% of time will be spent conducting investigations, training design, evaluation and administration. This portion of the work also demands mobility throughout the UK.

6. Social conditions

The post holder will be an integral part of the management training team (currently comprising one departmental manager, four senior tutors and 12 tutors). Most management courses will run with two tutors. The amount of off-site training will inevitably mean the post-holder will spend much out of course time with other tutors.

7. Economic conditions

Salary is within the range of £23 – £29,000. There is a five point incremental scale. A contributory pension scheme is available. An annual profit sharing scheme is in operation. A company car (currently a 1.8 Vauxhall Vectra) is provided. Annual holidays start at four weeks progressing to six weeks after ten years service. Relocation expenses subject to a maximum of £10k are payable.

8. Promotion prospects

Promotion is on merit to the grade of senior tutor (of which there are four posts) and head of management training. Further promotion will involve moving out of the field of training into general management.

Stage two – the key attributes

Once you are satisfied that the job specification is accurate, the next step is to use the job specification to identify the key attributes required to perform the tasks outlined in the specification.

This will involve in two phases. First identify the key result areas (the KRAs) for the post. These are the areas of the job in which good performance is essential, or conversely in which poor performance could be disastrous.

Once the KRAs have been identified the second phase in determining how well a person is likely to fit a job is to break each KRA down and describe it in terms of the knowledge, skills and attitudes (K/S/A/s) required.

In general terms knowledge is made up of the things that are critical to know for the achievement of the job's objectives. Skills are the techniques or methods that the individual can do on their own. Attitude is probably more difficult to define but can be described as the general social/behavioral skills required for effective performance, e.g. motivation, leadership, diplomacy etc.

Example: Key result areas for a management training tutor

KRA	**Knowledge**	**Skill**	**Attitude**
Present sessions to managers at all levels	Best practice in managerial field Use of varied training styles	Presentation ability Self-expression Use of visual aids	Understanding Confidence Flexibility Quick-witted Perceptive Adaptive
Produce new courses and adapt existing ones	As above and up-to-date thinking in changing managerial field	Written skills Ideas into practice Production of training aids	Perception Realism
To carry out training needs analyses	Forms of training needs analysis Working of the organisation	Communication Statistical interpretation and analysis Translation of needs to courses	Tact Diplomacy Determination Understanding
Manage training aids budget	Budgeting Availability of training aids	Numeracy Negotiation skills	Organised Methodical
Manage staff in general office	Office procedures	Staff training and development Appraisal	Motivation Leadership Guidance Inspiration

Activity point

The key attributes

Spend some time drawing up a first draft of the key results areas and their knowledge skills and attitudes required for your chosen post.

Stage three – the person specification

The information that they have gathered to produce the job specification, KRAs and KSA's are now used to produce the person specification. This attempts to describe the kind of person best suited to fill the post. It is a key document in the recruitment and selection process. It provides the criteria against which to make judgements about the candidates by identifying which combination of personal factors are essential for successfully performing in the post. It is used to draft advertisements, sift candidates at the application form stage and provides the content for your interviewing guide that will assist you in structuring your interview.

In specifying the factors in the person specification it is important to identify not only what is essential but also what is desirable.

Essential: means that any candidate lacking in this attribute must be rejected.

Desirable: indicates an additional attribute that can be useful to distinguish between two or more acceptable candidates.

Another useful category is the ***contra-indications*** – those attributes that would indicate unsuitability for a particular post, e.g. colour blindness.

There are many structured approaches available in drawing up a person specification. Whichever you use they should include details of:

- Skills, aptitude, knowledge and experience.
- Qualifications (which should be only those necessary to do the job – unless candidates are recruited on the basis of future potential, eg graduates).
- Personal qualities relevant to the job, such as an ability to work as part of a team. In many organisations these are found in a competency framework.

Setting competency criteria

- Competencies are defined as: ‘**The individual characteristics or skills that can be measured reliably and that can be shown to make a significant difference to performance.**’
- Competencies are the underlying characteristics that enable people to perform effectively in a given role, including skills, attributes and capabilities.
- They are those behaviours listed in the person specification that reflect the skills and abilities needed to deliver the main work objectives.

The most popular competencies found in employer competency frameworks are:

- Team orientation
- Communication
- People management
- Customer focus
- Results-orientation
- Problem-solving.

Not all competencies will lend themselves to be displayed or assessed during the interview, some will need to be demonstrated in either a simulated exercise (e.g. a presentation) or observed in practice.

Example person specification: management training tutor

1. Education to degree level and a relevant professional qualification such as CIPD or equivalent.
2. Significant post-qualification experience of working at senior level as a training and development professional in a large and complex organization.
3. A track record of leading successful strategic staff development projects, including organizational development and leadership/management development initiatives.
4. Experience of all aspects of managing and motivating a team and of planning and controlling budgets.
5. Familiarity with the issues facing the higher education sector and how these impact on its staff development agenda.

6. A clear commitment to equality of opportunity and an understanding of how that can be embedded into the work of the post holder and the staff development unit.
7. Outstanding interpersonal skills including presentation, facilitation and negotiation skills.
8. Personal credibility and the ability to gain the confidence of others from a wide range of academic and professional backgrounds.
9. Outstanding oral and written communication skills and the ability to influence colleagues at all levels.
10. Strong analytical skills and a track record of effective problem-solving and influencing change. A combination of strategic ability and a hands-on approach to achieving goals.
11. A team player with the ability to self motivate, and to work both independently and on her/his own initiative.
12. Computer literacy – a good working knowledge of the MS suite of IT packages and of using HR and/or training systems.

A

Activity point

The person specification

Have a go at drafting a person specification for the post of your choice.

Look out for over-specification – 'Only Superman Need Apply!' – and ill defined or vague specifications, which give ample scope for subjectivity or interpretation, or that may lead to race or sex discrimination. All attributes need to be as precisely defined as possible rather than based on general phrases and assumptions, e.g. 'Must be able to carry an 11 stone person 20 feet up a ladder whilst wearing breathing apparatus', rather than 'Must be strong'.

Watch out for phrases such as 'Must fit in' or 'Have a suitable personality' under the disposition category. These have been frowned on by industrial tribunals who see this as a method of perpetuating the discriminatory practices that go on in many organizations. This is because these phrases usually reflect the characteristics of the people who are doing the selecting, which are often white and male, and will lead them open to allegations of unconscious prejudice.

Health and age are often over specified and could disadvantage older and disabled candidates. What we are after is a checklist that will give us an objective view of the best person to do the job.

Putting it all together

Having assembled all the basic material you are now in the best possible position to prepare for the selection interview. You can now start to develop an interview plan that will determine how best to observe or measure the key attributes. Careful thought will need to go in to identifying what questions are required to provide the accurate information needed to make an assessment.

Whilst many inexperienced interviewers think that they can do without a structured interview guide, the research evidence shows that a guide will result in better quality decisions. By using a guide you will be applying the same frame of reference to each candidate and covering the same areas for each. This is not a straight-jacket but an example of how structure can give freedom to explore the chosen area in greater depth.

The interview guide should be developed after studying the analyzed information. It should give you and your co-interviewers an initial series of questions with which to probe the candidates. These will concentrate on the areas that have been highlighted from the analysis as having a significant impact on the candidate's ability to do the job effectively.

Interviewers who use guides are better able to recall information and know what to ask and what to do with the information they gain.

A planned approach to selection interviews

Before the interview

- Review the job advertisement and all the background information that was used to establish the key criteria for the post.
- Review all available information on the candidates and identify suitable topics to pursue during the interview.
- Agree on topics for discussion that will give each candidate the opportunity to demonstrate their ability to do the job.
- Agree an interview plan and who will cover what ground in questioning.

During the interview

A typical interview plan for a three-member panel would divide into the following sections:

Stage	Person Involved	Action	Time
Opening	Chairperson	Meet candidate Bring into room Introduce to panel Settle candidate Outline format of interview Mention note taking	5 mins
Ask Questions	Chairperson	General questions: Current post Reason for application Strengths they bring to vacancy	5 mins

Stage	Person Involved	Action	Time
	Line Manager	Job specific questions: Probe competencies Explore strengths Review weaknesses Focus on experience	10 mins
	Independent manager	Broader issues: Management expertise External/political environment Focus on potential	10 mins
	Chairperson	Supplementary questions: Follow-up issues Clarify inconsistencies	5 mins
Supply Information	Chairperson	Invite questions from candidate: Answer or pass to panel	5 mins
Close	Chairperson	Check all information is covered Ask candidate if anything to add Inform of next stages and timings Check availability for next stage Thank them for attending	5 mins

After the interview

- Reflect on the information gained and evaluate the candidate against the published criteria.
- Individual managers rate the candidates performance against each competence and then discuss these with the chairperson.
- Explore what you have found out about the candidate in relation to the advertised profile.

- Establish the suitability of the candidate against the competence required to perform the job.
- If the candidate lacks experience in a competence, could they be trained to do it?
- Discuss the evidence you used to make your rating. Does it complement that of your fellow panel members?
- Agree an overall rating for the candidate. If the panel is split, the chairperson will make the final decision.
- The chairperson (assisted by the panel members) completes an assessment sheet based on the findings of the panel on the candidates' performance in each key eligibility criteria.
- Review how you worked as a panel. How well did you manage the interview, control time, pose questions, gather information, move between panel members, start and finish the interview?
- Allow yourself enough time to prepare for the next candidate.

A

Activity point

Develop you own interviewing guide for an interview of your choice.

Plan your questions

Having devised a working plan, the final stage of successful planning involves identifying a range of questions that will enable you to obtain evidence against each of the selection criteria you have identified.

The interview is designed to both help you and the interviewing panel gather information about the candidate, and to help the candidate demonstrate they have the capabilities to perform well in the post.

In order to do this effectively they need to make sure that their questions are:

- Brief
- Directly relate to the subject being discussed
- Relevant to the key criteria for the post

- Clear and unambiguous
- Not discriminatory
- Open (e.g. what are the characteristics of an effectively written report?)
- Designed to get the candidate talking about their skills and experience.

Example: 'Model interview question guide'

Key criteria: Management training tutor

(Questions should be asked for each criteria to every candidate.)

Presentation skills

- Tell us about a presentation you have made recently to a hostile audience.
  - What were your audiences' main objections?
  - How did you handle them?
  - What could you do to improve your representational skills?
- Can you give me an example of when you have been effective at facilitating a small group of people?
  - Why was it successful?
  - What would you do if you had to repeat the activity?

Designing and adapting training courses

- What do you think have been the most significant advances in management training over the last few years?
  - What attempts have you made to incorporate these into your training programmes?
  - How were these innovations/ideas received?
  - What would you do differently if we asked you to introduce these ideas into our organization?

Carrying out training needs analysis projects

- Describe a project you have managed to a tight deadline
  - What was the most critical element of your plan?
  - How did you ensure that individuals kept to the plan?

- How would you go about establishing your customers' needs?
  - How would you prioritize these within our business plan?
  - How would you evaluate whether your section are providing an effective service?

Management of training contracts/budgets

- What key elements would you consider when drafting a contract specification?
- Describe a recent successful negotiation you have had.
  - Why was it successful?
- How would you describe your negotiating style?
  - What do you consider are the strengths and limitations of that style?

Management of staff in general office

- What opportunities have you had to lead a team?
  - Give us an example of what you've done to motivate your team members.
- How would you describe your leadership style?
  - Tell us about a time when your preferred style hasn't been effective.
  - What did you do to remedy that situation?
- Tell us about a situation when you've had to implement significant changes to the way people worked.
  - What are the most important lessons you've learned about persuading others to change?

A

Activity point

Prepare an interview question guide to use on your sample job.

Making your choice

The chairperson facilitates a discussion that aims to select the best person for the job.

- Review the interview assessment sheet together with any other relevant information, e.g. job application forms.
- Include additional assessment information required from all candidates, e.g. samples of written work, oral presentation ratings, psychometric tests etc.
- Rank all the candidates who achieve the highest markings.
- If more than one of the candidates is assessed as 'highly suitable' they must be ranked in order of merit.
- If the panel is split the chairperson should make the final decision.
- If no candidate meets the minimum specification required to perform the job effectively it is always better to re-advertise the post, rather than appoint a weak candidate.

Summary

There are a number of consequences for not following a structured, systematic approach to defining the best person for the job:

- Selection standards will be vague and ill defined.
- The criteria may be incomplete with critical attributes ignored.
- Selectors will be more prone to the influence of irrelevant factors because they do not know what to look for.
- Their assessments will become prone to the bias and distortion that hallmarks an ineffective interview.

The results for your organization in recruiting the wrong person for the job are numerous, varied and often expensive.

A systematic approach to analyzing the essential requirements for the effective performance of the job will enable you and your fellow interviewers to prepare effectively, ask the relevant questions and help you suspend unconscious stereotypes and prejudices that get in the way of selecting the right person for the job.

(Further information on the research into the effectiveness of selection interviews can be gained from reading *Selection and Assessment – A new appraisal* by M. Smith, M Gregg and D. Andrews, Published by Pitman, 1989.)

Checklist

- ✓ Be aware of the costs to your organization of having the wrong person in the job.
- ✓ Are you aware of any bias and distortion you might be prone to in the selection process?
- ✓ Set yourself up for success by writing a job specification, the key attributes for successful performance and a person specification.
- ✓ Use these as a template when drawing up a job advertisement, short-listing and preparing your interview guide.
- ✓ Make sure that everyone present at the interview – the panel members and the candidates – know exactly what their role and responsibilities are.
- ✓ Compare each candidate's performance against criteria established in your interview guide. Don't introduce any extra criteria at the decision-making stage.
- ✓ Are you satisfied that you have developed a transparent audit trail that will stand up to independent scrutiny that your recruitment and selection process is fair and equitable?
- ✓ Remember, if in doubt don't appoint. Don't *'decide in haste, repent at leisure'.*

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Chapter ten

Preparing your material

Introduction

At the end of this chapter you will be able to identify and carry out the full range of preparation that is required to design an effective training session. This will enable you to:

- Take the steps required for effective preparation
- Identify the most effective combination of topics to include in any training activity
- Recognize the value of a structured approach to training events
- Write a session plan that realistically meets the training objectives within a set timescale

How do I decide what to teach?

Winston Churchill is reputed to have said the following about his speech-making abilities:

"If I am to speak for three hours I need ten minutes preparation, but if I am to speak for 10 minutes I will need three hours preparation."

He certainly thought that thorough preparation was vital if he was to get his message over in the best possible way.

All training events make use of valuable resources and manpower and it is up to the training manager to make sure they are used to the best advantage.

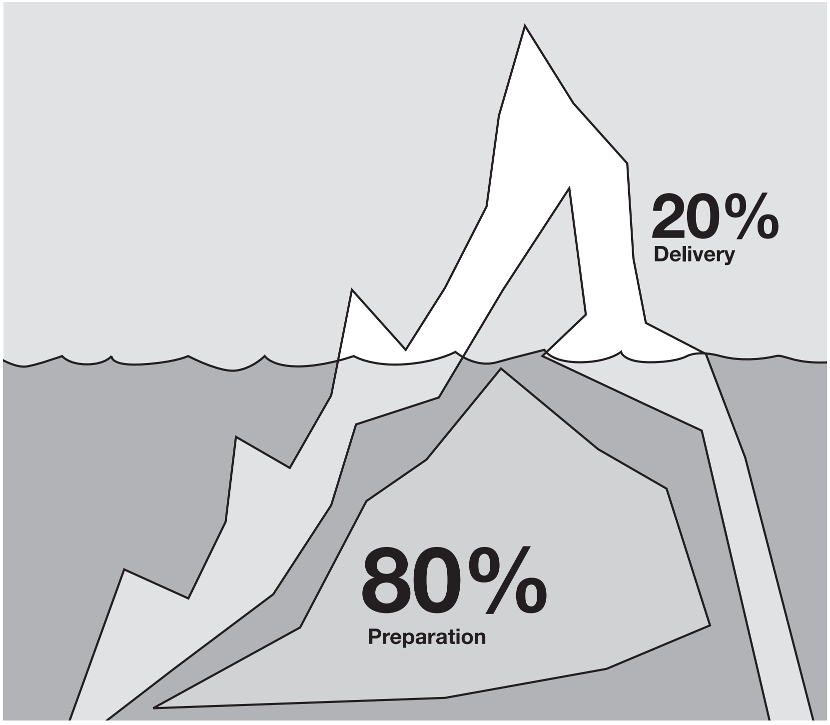
A

Action point

Have you ever experienced training, either one-to-one or on a training course, where the trainer seemed to get by with the minimum of preparation, relying on their expertise, knowledge of the subject and a modicum of luck to get through?

Whilst some will succeed we invite you to question:

- Do the students learn?
- If they learn, is it because of or in spite of the instructor?
- Are they learning the things they really need?
- Is their learning efficient and effective?



The importance of preparation

It is easy to underestimate the amount of time that preparation takes but in training and development, like many management activities, the 5 P's apply:

P = Proper

P = Preparation

P = Prevents

P = Poor

P = Performance.

What's the purpose of the training session?

Most training sessions have one or two basic purposes. They are either designed to **inform** or **instruct** or they use a combination of both. When the main purpose is to inform the participants are usually presented with information about facts, knowledge or basic principles. This is often classroom based training which has the advantages of scale and consistency, being able to put over a great deal of information to a large group of individuals at one time.

Instructing aims to develop a specific set of skills. To gain mastery this will require the participant moving out of the classroom and having a go, either in a workshop simulation or on the job.

Most vocational training is a combination of the both. The theory session, in which the participants are told about the background information, is followed by the skills session. In this chapter we will be looking at an approach to preparation that can be used whatever the requirements of the training event.

When you are involved in the design and delivery of training you should keep this poem in mind. It will act as a good memory aid.

'I keep six honest serving men
(They taught me all I knew)
Their names are What and Why and When
And How and Where and Who.'

Rudyard Kipling, *Just So Stories – the Elephant's Child,* 1902.

As far as training is concerned all the relevant factors can be summed up in this formula:

Preparation formula

WHO **WHY** **WHAT**	+	**WHERE** **WHEN**	=	**HOW**

WHO	are you going to train; your audience
WHY	are you giving the training; your objectives
WHAT	are you going to cover; your subject
WHERE	are you running the event; your location
WHEN	are you delivering the session; your time
HOW	are you going to put it together; your structure

Who are your audience?

Find out as much as you can about the people you will be training:

- how much do they know, or think they know already
- How large is the gap to what they need to know?
- What are some of the folklore, myths, organizational grapevine messages they will have heard?
- Have they had previous training in this topic area?
- How well was that received?
- Are they going to be a friendly or hostile group?
- Have they volunteered or are they being sent on the course?
- What benefits may appeal to them?
- What special interests might they have?
- What do I know about their social background, age range, educational level, sex, race etc?
- What do they want to know?
- What's their learning style?

Why are you giving the training?

- Why were you chosen to do this training?
- What specialist knowledge or skill do you have?
- What are your objectives for the training?
- Is it a precise statement of what the learner will do as a result of the training?
- Can you describe these changes of behaviour in terms of the knowledge or skills gained, or are you aiming for a change in attitude?
- Most sessions will have several objectives, have you identified your main one and the subsidiaries that will help you get there?

What are you going to talk about?

- Identify all the information you could possibly cover.
- Don't try to put it in any order, write it down as it comes to mind.
- You may find that the 'mind map' approach will help.
- Brainstorm all possible ideas; use single words, colours, images.
- Don't worry if it's messy.
- Make notes from all the information you can access from:
  - your own knowledge and experience
  - discussions with others, including trainers
  - files, documents, books, videotapes
  - material that was used to teach you.
- Having cast your net wide it's now time to filter it down.
- Categorize each item according to how it will help you achieve your main objective:

  a – essential; must know by the end of the session

  b – important; should know by the end of the session

  c – interesting; could know by the end of the session

  d – irrelevant; no need to cover in this session.

You now have defined the main focus of your session in order of importance. The material not covered could be used on other occasions.

Where are you running the event?

- Take time to check both familiar and unfamiliar territory.
- What facilities are available?
- What visual aid equipment will be supplied? How does it work?
- What equipment will you need to take with you?
- How could the shape and size of the room affect your performance?

- Can the seating arrangements be adjusted to suit your requirements?
- Will there be any internal or external interruptions?
- Is the environment comfortable and the heating adjustable?
- Can I take the group/individual out of the workplace?
- Is there a quiet room set up and available?
- Can you get there on time? What about parking etc?

When will the training take place?

- Have you considered the time factors involved?
- Will you have enough lead time to prepare yourself, and possibly the individuals thoroughly?
- How long will the training last? Will it be long enough?
- How has the training time been allocated (a whole week, three days initially followed by a two day follow up, every Wednesday morning)?
- What time of the day will you be talking?
  - **Morning**. They may be late. Will they have had coffee?
  - **Afternoon**. The trainer's graveyard – just after lunch. You'll need something lively to keep them awake.
  - **Evening**. How have they spent the day? What energy levels do they have for your session?
- What other training sessions will come before or after you? What impact will their messages have on your session?

How are you going to structure the talk?

(What follows is mainly concerned with presenting a theory-based session, which may not be the most appropriate focus for your participants. Whilst most of the information is generic to training you may wish to consider Chapter 14 which deals solely with facilitating a skills based on-the job training session.)

Once you know what you want to say, to whom, where, when and why, you can finally work out how.

The three 'tells'

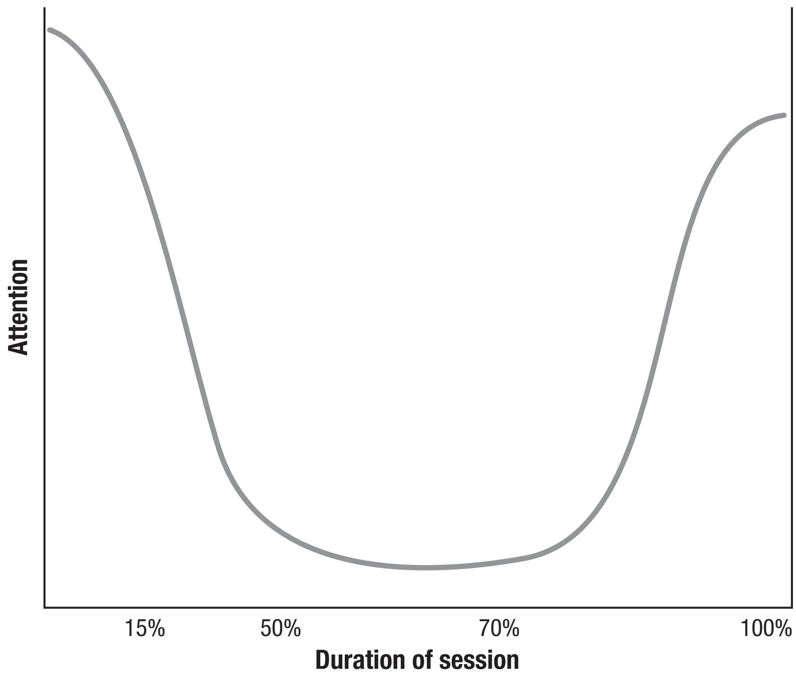
1. Tell them what you are going to tell them
2. Tell them
3. Tell them what you have told them

Trainers and speakers do not only use this well-known approach worldwide it is also used by the media. 'News At Ten' for example, always starts by raising our interest (the introduction) then moves on to tell us the individual items raised (the main body) and finally finishes off with a reminder of the main stories that night(the conclusion).

The main body of the session

- For planning purposes it is best to start with the main body of your talk, let the introduction and conclusion flow from this.
- Group your points in order to meet the points you've researched and which the participants need to know to meet your objectives.
- Write them on cards or 'post-it' notes. This will enable you to shuffle them around.
- Don't be over ambitious. Remember your timescale, 'Must, Should and Could' and keep it simple.
- Prune and choose which points you will use.
- Now arrange them into the most effective sequence for your purpose. To help you do this consider the following factors:
  - Follow a logical order. One piece of information may have to be mastered before the next. Teaching in chronological sequences required by a systematic approach can reinforce this.

– Present the new information in easily digestible chunks. Break it down into small discrete sub-sections.
– Move from the simple to the complex. Introduce the basics before moving on to more complicated material.
– Go from the known to the unknown. Start where the participants are. Build on what they know and then gradually introduce new learning.
– Start with the practical and move to the abstract. They'll learn wider concepts if introduced via skills covering those principles.
– Start with a current problem, identify the options and establish a recommended solution. This can be a very effective way of changing attitudes.
– Interest sequence. The interest value of your material may vary. Participant interest is usually high at the beginning and end of sessions. Use this knowledge to strategically place your material.



Group interest during a training session

When you have established your most effective running order you can number and sequence them into the main body.

In presenting each of these you should follow a similar approach:

E **Explanation.** Give the trainees the new facts or lead them to discover them through question and answer sessions (See Chapter 13 Developing training skills).

A **Activity**. Do something that stimulates their interest and fills the gap. This could be to reinforce what you have said with a carefully chosen OHP, showing a video clip or having them participate in an activity that reinforces your main points.

S **Summary.** Summarize the main points covered. Pause for questions and make sure that all the group understands before moving on to the next point in your sequence.

The conclusion

The ending is too important to be left to chance. It forms the bridge from present to future courses of action. It should be managed to include:

- A warning that the end is near.
- A summary of the main points.
- An invitation to ask questions to clear any doubts.
- Repeat the main message. Point out your objectives and how you've achieved them.
- A recommendation or reminder of what happens next.
- Thank them (sincerely) for participation and attention.

Your conclusion should be short, succinct and relevant. You should leave your audience in no doubt that you've finished.

The introduction

You end at the beginning. Having mapped out what you are going to do you are now in a position to write your opening. In the introduction you need to show the participants that the subject is important. If they acquire this knowledge they can make a contribution to the organization and benefit personally. You also need to orientate them to what is coming. A mnemonic that helps you cover all the ingredients of an opening is INTRO.

I **INTEREST.** Grab their interest with a relevant opening.

N **NEED.** Why they need to know about this topic. What's in it for them?

T **TOPIC.** What the subject is about. Orientate them to what has gone on before.

R **RANGE.** A preview of what they will be covering and how. Also include your questions and handout policy.

O **OUTPUT.** What the trainees will be able to do or know at the end of the session.

Writing and using your brief

A brief is the summary you prepare for yourself about what you are going to cover during the session. Consider it to be your safety net. Whatever happens during the delivery of the training session you can fall back to your brief for help. Point out that this is not a full, verbatim account of what you are going to say. That's called a script and is best avoided by all except experienced actors. Don't be afraid to use it in front of the group.

There are several different formats – mind maps, prompt cards, A4 summary sheets, auto-cue etc – experiment with different formats to find which one suits your style and circumstances.

The following guidelines will apply:

- Prepare your own
- Don't write it out in full
- Use headings and key words
- Large print, you may have to read from a distance
- Leave plenty of white space between lines and topics
- Identify must, should and could knows
- Use colour (for the point above for example)
- Print on one side only
- Finish one page with the first line of the next
- Mark stage directions carefully

- Include a running time estimate. You can quicken or slow your pace to match
- Number pages and fasten together loosely (e.g. India-tag)
- Have a summary of the session on one page.

Example

Introduction to training: Introduction

I = Show OHT 1 – sick bear with measles spots.

N = Tell the participants that 'training once used to be considered like an attack of measles – once you had it you were immune for life.'

Point out that modern organizations recognize that training is no longer something you complete as a 'right of passage' but has become a continuous process that is integral to business development.

T = introduction to training.

R = 'In this session we will cover why organizations train, and what are the benefits for the organization, managers and employees. This will involve you both listening to some short inputs from the trainer but also participating in some syndicate work that will help you focus on the topic. At the end of the session I will be issuing a handout covering a summary of the key points.'

O = At the end of this session you will be able to:

1. List the main reasons why organizations train.
2. identify at least two reasons that currently apply in your organization.

The main body

The reasons why we train

Treatment:

- Divide the participants into syndicates with three or four in each group.
- Show OHT 2 – 'Reasons why we train – syndicate exercise.'

- Inform them that they will have 20 minutes to discuss and record onto flipchart paper or acetate the following questions:
  - Benefits to the organization
  - Benefits for employees
  - Legal requirements

(Variation – give one question to each of your three syndicate groups.)

- Check the participants understand and get them underway.
- Move around the groups to ensure they keep on track but don't interfere.
- Reconvene at the end of 20 minutes and ask for volunteers to present first.
- Suggest that participants observe each mini-presentation and make a note of:
  a. What helped in their presentation?
  b. What was less effective?
- Point out that we will come back to this information in a later session on presenting effective training.
- Have the group clarify anything they didn't understand or disagreed with at the end of each presentation.
- Consolidate this section by showing summary OHT 3 – '**Reasons for training – an overview**'.

Training strategies used by organizations

- Show OHT 4 – **Training strategies used by organizations.**
- Lead a discussion in how organizations use a variety of strategies. Illustrate each type of strategy with an anecdote or example based on your own experience.
- Ask participants for their own experiences of the types of strategy described.
- Ask what must a training department must do to ensure that it is in the main stream of its organizations thinking and not seen as an Ivory Tower.

- Expect an answer around being proactive and identifying future needs that impact on business objectives.
- Links ahead to next session: Explain that in order to be proactive we need to devise a systematic approach to training that clearly links design, delivery and evaluation to key business needs. This will be the topic covered in our next session after tea/coffee.
- The close: Summarize everything that as been covered – Reshow OHT's for added emphasis.
- Issue handout.
- Check around the group for any final questions.
- Thank them for their attention.
- Tell them you look forward to seeing them at the next session – after the break.

A

Activity point

Prepare a training session plan for yourself or one of your training team who will be delivering to a real life group of trainees.

Our two handouts 'the session plan' and 'the session summary sheet'. will help. Feel free to experiment with any form of session plan if you don't want to use the ones provided.

We suggest that you work in small groups or pairs, using your partner as a sounding board for advice. Writing training sessions can be a solitary activity so take an opportunity to have some support during the learning process.

Handout 1: The session summary sheet

Training session leader:

____

____

Training session title:

____

____

Target audience:

The introduction:

I Interest

N Need

T Topic

R Range

O Output

The main body

Point 1

Point 2

Point 3

Point 4

Point 5

Point 6

Point 7

Point 8

The conclusion

Signal the end

Summary of the main points

Final questions

Repeat the main message

Point out what happens next

Handout 2: The session planning sheet

Session title

Purpose

Main teaching points

Timing overall

Sub-sections

Materials and resources

- Handouts
- OHP's
- Equipment

How I'll do it

- Time
- Main Teaching
- Development
- Stage
- Points
- Directions

Checklist

✓ Remember that proper preparation prevents poor performance.

✓ For every training session keep in mind:

- What is the purpose of my training session?
- Who are my audience?
- Why was I chosen to do this training?
- What am I going to talk about?
- Where am I running the event? Will they have all the facilities I planned to use?
- At what time of the day will the training take place?
- How can I best structure the session for maximum impact?

✓ Ask yourself:

- ‘Have I pruned out unnecessary items and included those I consider on a “Need to know” basis?
- Does my session have an opening that is going to grab their attention?
- Does the main body develop in a logical sequence?
- Is my conclusion short and succinct, leaving my audience in no doubt I have finished?
- Have I prepared a user-friendly written trainer’s brief?
- Have I bench-tested your material by trying it out on a select group? Remember, don’t practice in the final.

✓ Seek and listen to feedback on your plan.

Chapter eleven

Writing training materials

Introduction

By the end of this chapter you will be able to:

- Identify the benefits of written communication over other forms of communication
- Work through the eleven key steps involved in writing effective training material
- Choose from 20 training methods and media to bring variety into your training design
- Produce a development plan for improving your competence in the 20 training methods

Written communication

In order to achieve results on your training events you need to communicate effectively with your trainees.

Communication involves sending ideas from one person to another (or several others). To communicate effectively we must be able to talk the same language. The two main kinds of communication – spoken and written are however quite different from each other.

When speaking there are a number of techniques that help make your meaning clear which are not there with writing:

- You can vary the tone of your voice.
- Use gestures and movements of eyes, hands, mouth etc. to change meaning.
- You have instant feedback on how your message has been received.
- You can even adjust you message mid-flow, changing your words and emphasis to make your communication successful.

Writing also needs care and skill, and years of schooling indicates that for most people it takes longer to master than speaking.

The benefits of writing

What do you think are the benefits of communicating in writing? We have identified the following:

- It is easier to present complex information in writing.
- It provides a permanent record of the information.
- You can check you have sent the information in the way you intended.
- You can also check the receiver has received the precise message you sent.
- The receivers are able to digest and respond to the information in their own time.
- You can reach many recipients at the same time with the same message.
- It puts the communication on a more formal footing.
- You can plan the message, make revisions and consider you choice of words without undue pressure.

What are some of the disadvantages of writing?

- It is generally more time consuming than speaking to someone.
- If you over-rely on written communication you can come over as stuffy and overformal.
- You don't know if your communication has been read or had the impact you'd anticipated.
- Even where it has been read it may not be correctly understood. The written word is subject to as many of the barriers to communication as the spoken word.

At some time in the work of a training and development department it will be necessary for you to write training material. These could be briefs, handouts, exercise instructions, training packages etc. All training management writing, as opposed to works of fiction, will benefit if you apply some of the general principles of effective writing.

Our top tips will help you achieve your aim of writing effective training materials.

How to write effective training materials

Identify the need

All training should be written in the context of satisfying your organization's key training needs. Your material should not be a flight of fancy but the result of a detailed analysis of what's required to meet the business needs of the organization. Your training session may be well written and work efficiently as a piece of training design, but it will not be effective training unless it delivers an end result that ultimately has an impact on overall performance.

Start where you mean to finish

Identify the objectives you are working towards before you start. These should flow from your training needs analysis and should specify the key knowledge, skills or attitudes that you want participants to be able to demonstrate at the end of the session.

Carefully worded objectives will give you a focus as you write. They will enable you to reject any items that don't add value to what you want to achieve.

If you don't know where you are going you may end up somewhere else and that destination may not be the one that satisfies your organization's needs.

Take them around the learning circle

Research into how adults learn (by David Kolb in the USA and Honey and Mumford in the UK) has been widely accepted as a working model by trainers and participants alike. As learning (sometimes defined as 'a relatively permanent change of behaviour as a result of experience') is what you are after, you will need to ensure that your training design includes all stages in the cycle. This will involve the participants:

- Having an experience.
- Stopping to make sense of it.
- Working out what it means (in relation to other experiences they have had, theories, models they know etc.)
- Planning how they can put this new insight into practice.

It doesn't matter what precise order you follow, as long as all four stages of the cycle are covered.

If you are writing a number of linked sessions then vary the order in which you take them through the cycle. This will help to create some variety and maintain their enthusiasm as they progress through the event, for example:

- **Reflect** – think of a past experience.
- **Theorize** – make sense of underlying concepts.
- **Plan** – how can you alter behaviour in the future?
- **Action** – lets try out your new plans in a practical activity.

Gather all your information before you write

Writing training material for others to perform will invariably mean distilling a great deal of information into its most useful form. I usually 'dump' everything I know about a topic on to a mind-map. This helps me develop my ideas and is more useful than a straightforward list. You'll probably be amazed at how much you know about your chosen training topic as your thoughts get transferred onto paper.

Be selective

Consider how long you have to achieve you key sessions objectives. Filter the information you've collated by using our simple ABC method:

A = **Essential.** Must know, or be able to perform this element.

B = **Should know.** Important information that will help in more complex cases.

C = **Could know.** Background information that will help a complete understanding of the element.

Put it all into logical sequence

Design a session that unfolds in a logical sequence. Take the participants from what they know into unknown areas. Start with simple concepts or skills and then move them too more complex ones. Use analogies to illustrate your material and make your ideas more accessible. If you are teaching a process or procedure follow it through your session in a machine-like sequence. This will reinforce which steps follow which when the participants come to perform the tasks in their workplace.

I often write all my key points on 'Post-it' notes before I write my first draft. I can easily move these around my desk until I'm happy with my running order.

Write in plain English

Trainers who are usually very effective when talking to a group often develop unfortunate habits when committing their ideas to paper. To overcome any problems we need to write as plainly and effectively as possible. Here are some tips for doing that:

Put yourself in your readers' shoes

Keep your audience in mind at all times. What information do they need and what language will they understand?

Put it into a logical order

Organize your writing to help your readers. Establish a plan and stick to it. Leave out information that is not essential to your message.

Keep sentances short and simple

Aim for an average of 15-20 words per sentence. If you write a long sentence try to rearrange the ideas to form two short ones. Each sentence should be devoted to one major idea.

Use clear familiar words

Aim to make your writing quick to read and easy to understand. Don't write 'terminate' if you could write 'end'. Use 'letter' rather than 'correspondence'; 'worsen' for 'exacerbate', and so on.

Use punctuation to aid understanding

Make sure your sentences are complete. Use semi-colons and commas to mark out your major and minor pauses.

Use a paragraph for each idea

Break up your writing into digestible chunks. Paragraphs give your reader a break. Paragraphs are made up of sentences with a common theme. When the theme changes, so should the paragraph.

Prefer the active to the passive

Active verbs are much clearer and easier to understand. Unlike passive verbs they tend to reflect how we speak. The trick is to put the doer before the done to, for example: 'We carried out a trial' rather than, 'A trial was carried out'.

Use verbs rather than nouns created from verbs

Too many reports are full of these grand sounding noun phrases. For example write 'use' instead of 'the utilization of'.

Use a conversational style

This will help you to write as you speak, for example: 'I think that', rather than, 'It is in the opinion of this author'.

Use specific words rather than abstract

For example write, 'Keep the hood down when the machine is working', rather than, 'We advise that the incorrect procedure can cause the machine to malfunction'.

Avoid 'officialese'

Avoid artificial language officials use to give an air of authority. You'll only sound pompous. For example don't write 'The duly executed forms should be submitted to the undersigned on completion', try 'Please return the signed forms to me when you have completed them'.

Avoid clichés like the plague

They're old hat! They can be useful to let your sense of humour and personal style come through in your writing, but they can easily be misinterpreted by participants who are from other cultures or eras to you. They may take away the wrong impression.

Explain your terminology

One areas jargon will not necessarily be understood in another area. If you need to use a jargon term whose meaning is not self-evident think how you can write it another way. If you can't think of an alternative treat it like an abbreviation. Explain it the first time you use it.

Make full use of varied layout

Make the layout helpful and easy on the eye. Use a lot of white space by putting extra line breaks between topics. Indent areas to give extra emphasis. Make full use of capitals, bold type and italics to highlight separate areas. Pie charts and histograms are an excellent way of conveying complex information in an easy to understand form.

Illustrate your text

Remember that a picture is worth a thousand words. Use diagrams and pictures to help convey your message. If you are writing material for other trainers then provide them with ready to produce OHP and handout masters. Make sure that these concisely convey your main teaching points. Provide a trainers manual that give precise stage directions telling them accurately what to do next.

Illustrate your script with simple picture icons that will help them to issue the appropriate handout or show the correct OHP.

Read it out loud

Whatever you write, read it out loud. If you find your material boring or awkward to speak, or difficult to follow then that will be equally true for your readers. How can you reduce long sentences or substitute alternative words?

Poof reed yore marital
(or proofread your material)

Good quality material will enhance your credibility. Poor editing will greatly reduce it. Most trainees will have heard the excuse that you have included a spelling mistake to check if they are reading it thoroughly! Always use the spell and grammar checker on you word processor and do double-check. Our subtitle above shows how easily misprints can creep through. Ask a colleague to act as your copy editor. They will invariably pick up ‘typos’ that you have missed and if *they* cannot understand what you are trying to say chances are neither will the trainees.

Vary your training methods and media

Introduce variety into you training material by not only varying the stages of the learning cycle but also by introducing a variety of training methods and media. As with all training planning, beware of variety for variety's sake. Ask yourself, 'Does this approach support the training objectives I defined at the outset.' If the answer is no, move on and incorporate some other activity into your material.

Here are some of the most popular methods and media we have used. How many of these do you have a good working knowledge of? Are there additional approaches you could use?

Method

1 Brainstorming

A participative activity for group problem-solving in which the participants suspend judgement whilst they produce a wide range of creative ideas in a short time. The technique can be used to identify problems, suggest causes, propose solutions and identify barriers to implementation.

2 Buzz groups

Small groups of, usually, 2-4 participants who discuss an assigned topic for a short period of time during a training activity. The groups stay in the main training room and the noise from their collective discussions produces the 'buzzing'. Groups can work on the same or associated topics before reporting back to the plenary group.

3 Business games

Participants are presented with a wide range of information about an organization (company products or services, market share, financial position, staffing levels, current economic climate etc.). They then manage the organization by taking decisions in response to events initiated by the trainer. The impact of their decisions on the profitability, morale and market share are then evaluated. A computer is often used to calculate the outcomes and compare their choices with 'real' scenarios.

4 Case studies

Provides an opportunity to study a day-to-day problem in a small group. The cases used are either real or an amalgam of complex problems similar organizations have faced in the past. This approach enables the participants to identify the causes and suggest solutions or make decisions. They provide an opportunity to practice analysis and decision-making away from the event in collaboration with fellow participants. The trainer may provide additional information if requested, give guidance on strategy and problem-solving techniques and disclose the outcome of the original case (which may not be the best solution).

5 Co-counselling

The participants work in pairs using the skills, attitudes and techniques borrowed from counselling. They are non-judgemental and take it in turns to help each other manage a personal problem by using their own resources. The technique is adapted from full-blown counselling to cover any work-place problems that affect the individual participant. The topics under discussion can either be driven by the trainer or left open for the participants to decide.

6 Demonstrations

The trainer, or subject matter expert, performs the whole of the training sequence whilst being watched by the participants. The performance is accompanied by a running commentary highlighting key steps in the process. The whole process may be repeated step by step to provide information about the principles involved in the key elements that make up the skill. The demonstration can be of either simple or complex tasks and can be performed in a training room, simulator or the actual workplace, for example checkout till or hospital operating theatre.

7 Discussions

The participants openly share their views, experiences, feelings and opinions about a selected topic. The trainer may either observe, steer the discussion back on track if it is moving away from the topic or may actively facilitate the discussion helping the participants explore their thinking but not imposing their own views.

8 Fishbowls

A group on group training method also known as clusters. The active group (Group A) are given a topic to discuss or task to perform. They are in-turn observed by the remaining participants (Group B) who are each briefed to give personal feedback to one of the individuals in the active group. The trainer can either focus on the leader of Group A or give general feedback on the how they worked together. Typically the groups reverse roles for the next exercise.

9 Instruction

A process in which the trainer guides the participants through the various stages that enable them to demonstrate their ability to perform a practical task. This could be either in a training centre or on-the-job. The trainer provides a demonstration of the complete task. They then repeat the first stage and guide and encourage the participant to perform it correctly. When this stage is mastered the trainer moves through the other stages of the process until the participant can demonstrate their skills in performing the whole task.

10 In-tray exercises

The participants are given an in-tray containing a number of 'real' documents (letters, memos, files, telephone messages etc.). They are given a role within an organization and asked to sort the documents into priority order and asked to make a decision on their choice of action. Their actions are compared with each other and the actual outcome provided (if known). Attempts to give participants an understanding of the real-life problems of a typical job holder without exposing them to the risk of failure in the workplace. This approach can be adapted for other areas that involve comparison between a range of documents, for example short-listing candidates from their application forms.

11 Lecture

Traditionally a straightforward talk to an audience given without much, if any, participation. It may be supported with a variety of visuals aids (powerpoint slides, overhead transparencies or video clips). This approach is suitable for a large audience where exact information must be put over to the group in a short time, and where little participation is possible (or sought). The basic approach can be adapted for smaller groups to allow greater participation. This could involve question and answer sessions, breaking the audience into buzz-groups or encouraging discussion. The more participative approaches will be difficult to manage with groups of over 20 participants.

12 Outdoor activities

Utilize the countryside as an alternative to classroom based activities. The focus is usually on developing teamwork, leadership skills and personal development using a variety of practical exercises. Inputs by trainers follow the review of practical exercises by participants and tutors. Although the outdoor tasks are not normal for the participants they are inescapably real. (They frequently involve bridge building, abseiling, orienteering etc.) Like managing at work, they are full of unpredictable events and people. A goal has to be achieved using a limited number of resources, often under physically challenging circumstances. Underlying management processes are quickly laid bare. Safety issues and the use of skilled and experienced technical staff are paramount.

13 Distance learning

Distance learning is where the learner is geographically removed, or distanced, from the source of the learning. An example is a correspondence course where a training organization sends training materials via postal mail to the learner who returns completed assignments by postal mail. Another example is 'online learning' or 'e-learning' where a learner uses a variety of computer and networking technologies to access (often remotely) training materials, interact with learners, for example, a learner might use an interactive DVD or CD-ROM on their computer).

14 Projects

A training exercise that involves the participants in gathering information or producing materials. The task is usually of some complexity and depth that requires the application of the training provided. It can be completed by an individual or a small group and can often fill several sessions throughout a training event. Projects are a useful way of evaluating learning and can also be used after the event to check the relevance of training to the participants work. A follow-up day is recommended to discuss the lessons learned from applying the training in a 'real' environment.

15 Questionnaires

A technique that is used to encourage reflection and build awareness of individual, team or organizational behaviour. Participants rate their responses to questions on various scales, inventories, check lists and questionnaires. Their individual response is then checked against an appropriate model, for example how often they respond from an assertive position rather than being aggressive or passive. Individual results can be compared with those of the other participants and other groups ('Norm tables'). Questionnaires can be developed by the trainer or purchased from a wide number of providers.

16 Role play

A dramatic training technique in which participants act out personal encounters under the guidance of the trainer. The performance is then analyzed to establish how well the participants have performed the underlying principles of behaviour. These principles can either be identified before the activity or the activity used to highlight typical problems that occur in face to face interaction. The amount of background detail provided can vary enormously, from a full script prescribing the behaviour of the participants to very little information from which they must improvise their approaches. Video recording and playback are frequently used to enhance the feedback to the participants.

17 Sensitivity groups

This is a term used to describe group training that is structured to make members aware of the interpersonal dynamics occurring within it. The other group members subject the behaviour of each individual in the group to examination and comment. Participants are encouraged to examine the consequences their behaviour is having on the other participants and consider possible alternatives. As this training is frequently unstructured (no tasks or games being set) and focuses on real issues as they emerge, it demands a highly skilled and sensitive trainer, experienced at dealing with the type of issues that may surface.

18 Syndicate exercises

A popular method for breaking up large groups and encouraging participation. Excellent for use with trainees who may be reluctant to speak-up in front of an audience. The main training group is sub-divided into smaller groups (ideally with not more than six members). Each of these syndicate groups works on the same or related problem with little trainer intervention. They reconvene for a plenary review at which a spokesperson from each syndicate presents a report of their conclusions for critical appraisal by the trainer and other participants.

19 Team exercises

The participants are asked to work as a team to undertake a short task following guidelines laid down by the trainer. The tasks are designed to highlight various aspects of management, leadership, problem-solving, decision-making and resolving conflict in small groups. Each task is followed by a review session from which the participants are encouraged to drawn their conclusions about what was effective and what could be changed for the future. The task set must be realistic and the outcome reasonably attainable. The trainer encourages the participants to look at how the group can compare their response with their workplace behaviour. For added variety the exercises can be run outdoors (see Outdoor activities above).

20 Video/training films

A wide selection of training videos and films are available to rent or buy. They are professionally produced and can add interest, colour, excitement and humour to a training session. Care must be taken that the entertainment value of the video does not detract from its training message. Videos can either be used as a substitute for a presentation, providing the participants with information in an easily digestible form. It can show critical incidents that would be difficult to simulate in a training room, for example car accidents or splitting an atom. They can be used as a case study to stimulate discussion on a particular topic area. Many videos can be stopped at various stages to discuss the critical incidents involved. Participants can then compare their views of what should happen with the eventual outcome. If you want to produce your own video in-house it is essential you follow good professional practice or the product is likely to be criticized by participants as amateurish and the training message ignored.

Training methods and media review sheet

Spend ten minutes working on your own rating your knowledge, skills and the applicability of each item on a scale of:

1 = Outstanding

2 = Very good

3 = Acceptable

4 = Not up to standard

5 = Very poor

Method	Knowledge	Skills	Applicability
1 Brainstorming			
2 Buzz groups			
3 Business games			
4 Case studies			
5 Co-counselling			
6 Demonstrations			
7 Discussions			
8 Fishbowls			
9 Instruction			
10 In-tray exercises			
11 Lecture			
12 Outdoor activities			
13 Distance learning			
14 Projects			
15 Questionnaires			
16 Role play			
17 Sensitivity groups			
18 Syndicate exercises			
19 Team exercises			
20 Video/training films			

Bench-test your material

The history of ideas is full of incidents that look great on the drawing board but fall flat when they are put into practice. We advise you follow Edison who treated his first 1,000 failed attempts as one step closer to perfecting the electric light bulb. I have also been carried away during the design and writing stage and produced a complex and intricate training session that just didn't work.

Try out the material by running a pilot session. Ask for feedback from the participants. Make any revisions suggested and then ask another trainer, preferably someone who hasn't been involved in the design and development stage, to try out the material with a typical target group of participants. If your training material comes through unscathed you can be satisfied that you have produced a professional piece of training material that really works.

Congratulate yourself

After all your efforts and hard work you've succeeded in producing high quality training materials that meet your organization's needs. Don't forget that writing any training material is a training exercise in itself. Take time out to review how well you tackled the assignment. What have you learnt from the experience that you can apply next time?

Checklist

Have you:

✓ Checked that writing is the best form of communication for this piece of work?

✓ Identified the key training need you are aiming to meet?

✓ Identified the learning objectives you are working towards?

✓ Made full use of the learning cycle by incorporating at least one of every stage into your design?

✓ Gathered all the information you need about the topic before you start to write?

✓ Sifted the information to identify what participants must know, should know and could know by the end of the activity?

✓ Put the material you've selected into a clear logical sequence?

✓ Written everything in plain English?

✓ Made full use of varied layout that's easy on the eye of the reader?

✓ Used diagrams and pictures where they help convey your main message?

✓ Read it through out loud, to ensure it sounds as good as it reads?

✓ Asked a colleague to proofread your material?

✓ Used a variety of training media and methods where they enhance your main learning objectives?

✓ Bench-tested your material by having a trial run and acting on the feedback you received?

Blank

Chapter twelve

Delivering a training session – How to make an effective presentation

Introduction

The purpose of this chapter is to introduce you to the key skills of effective training delivery.

By the end of this chapter you will be able to:

- Identify a range of behaviours that get in the way of delivering a training session effectively
- Specify the behaviour required for effective delivery
- Prepare and deliver a training session designed to hold the interest of the trainees.

As a training manager you may be asked to make presentations on a number of different events, for example:

- Talking to the local chamber of commerce
- Presenting a case to the management board
- As a specialist speaker on a training course
- At a team briefing to your staff
- As a union representative at a conference

All of these require the application of good presentation skills and the same is true of running a training event for a group of people.

Credibility

Most audiences have a built in sympathy for the presenter, but as the training manager you will undoubtedly suffer a loss of credibility in your organization if you are seen to be lacking in this fundamental skill of training.

The aim of this chapter is not to take away the fear. You will need to harness the adrenalin it produces to avoid becoming complacent and continue to do a thorough job. What we aim to do is set you up for success. If Chapter 11's analogy was the iceberg – remember that 80% of the success of any presentation is in the preparation – this chapter's analogy is the swan – sailing serenely on the surface even though they may be paddling like mad underneath. It's what the trainees see and hear that count, not what might be going on under your skin.

The three ingredients of communication

There has been a great deal of research into the various facets of communication which endeavors to find which has the greatest impact on the listener. Professor Albert Mehrabian studied a small group of individuals who were talking about their feelings and attitudes. He concluded that where there was an element of inconsistency between the three elements that make up verbal communication, the impact each made was:

Words = 7%

Voice tone = 38%

Body language = 55%

Impact on communication = 100 %

His research shows not that the words are unimportant but rather the need to make all three elements of verbal communication compatible. If the three elements are not sending the same message, then the words will be down graded by the listener in favour of the impression made by the other two.

(Source: Mehrabian, A., 1981, *Silent messages: Implicit communication of emotions and attitudes*, 2nd ed., Wadsworth, Belmont, California.)

A

Activity point

Recall a time when you have been on the receiving end of a communication during which you paid little attention to what was said because of how it was being put over. You should easily be able to recall some incidents that will help confirm the validity of our figures.

Let's identify the key components

What can you do to set yourself up to succeed? The main points to look out for will include:

Your words

- Avoid jargon and abbreviations
- Use everyday familiar words
- Take care with regional colloquialisms

- Keep your sentences short and simple (KISS)
- Talk at a level your audience will understand
- Don't patronize or talk down to them
- Paint verbal pictures by using examples, analogies and metaphors
- Make frequent use of summaries
- Signpost the way ahead, tell them what's coming next
- Don't apologize and use negatives
- Stress the positive and sell the benefits
- Put forward what's in it for them
- Steer clear of talking about statistics
- Put detail on an OHP and reinforce with a handout
- Take care to avoid filler words with no meaning, 'Err', 'Um', 'You Know what I mean', 'like'
- Repeat key phrases and tell them you are doing it
- Carefully script your opening and then memorize it. A positive opening will give you and the group confidence
- Always end with a high spot that leaves them wanting to hear more.

Your tone of voice

- Vary your pace and volume to avoid monotony
- Use your natural speaking voice. Acting is difficult to maintain
- Don't worry about having a regional accent, it can add interest
- Speak louder than usual; try to throw your voice to the back of the room
- Don't shout, you'll strain your voice and deafen small groups
- Over emphasize and accentuate syllables. Sharp increases or decreases in volume will aid listening
- Speak slower than usual. When we're nervous we tend to go faster
- Develop the art of the pause and use it to emphasize your main points

- Watch out for a tendency to gabble
- Pronounce each word fully
- Project enthusiasm; keep a 'sparkle' in your voice
- Vary your tempo for different audiences and at different times in your talk
- Don't drop your voice at the end of sentences
- Speak clearly and precisely, don't mumble
- Emphasize the key words in your message.

Your body language

- Dress appropriately, be and look efficient and businesslike
- Be natural in your movements
- Don't worry unduly about mannerisms, but beware of those that distract
- Use your eyes to communicate your messages
- Don't read your notes or stare at the ceiling or floor
- Look at the whole group, not just at the friendly faces
- Smile and convey enjoyment and enthusiasm about your subject
- Move about occasionally and use hand gestures to reinforce points
- Put down marker pens, pointers etc, don't play with them
- Use open posture to convey your confidence
- Stand or sit as appropriate, but don't slouch
- Empty your pockets of loose change, you won't distract by playing with it
- Don't wear distracting jewellery – noisy bracelets, bleeping watches, earrings that catch the light
- Avoid clutching the lectern until your knuckles show white
- Check your grooming before you start, then there will be no need to tug your hair, play with clothes or scratch yourself
- When being questioned look directly at the questioner
- Pause and look down when considering an answer

- Look directly at them when giving your answer
- Keep your hands in front ready for action, don’t have them in your pockets, on your hips or have your arms folded
- Walk slowly to the front, look at your group and smile
- Take a few deep breaths before you start
- Be poised, be courteous, be sincere and above all be yourself.

Activity point

Making a training presentation

You should seek out the opportunity to demonstrate these skills by delivering a training session developed earlier.

We suggest that you use the information presented in Chapter 10 Preparing your material. If appropriate set up a video recording that will enable you to review your session after the event. Ask two observers to take part and give you constructive feedback on what went well and what you can do to improve your performance. Issue them each with a copy of the training delivery observers sheet. An aid to help them review your performance.

Training delivery – observers’ sheet

Presenter’s name: ________________________________

Topic: ________________________________

Start time: ________________________________

Organization and content

- Appropriate introduction
- Clear purpose
- Smooth transition
- Established main principles
- Development of teaching points
- Adapted to group needs and interests
- Positive conclusion
- Pointed way ahead
- Timing of session

Presentation

- Appropriate use of words
- Voice tone and expression
- Body language and gestures
- Use of trainer's brief
- Visual aids (if applicable)
- Handling group interaction

Finish time: ______________________________

Overall impact

Very poor *Excellent*

1 2 3 4 5

Main positive point

____

____

Main development need

____

____

Any other comments (please be specific)

____

____

____

____

____

____

____

____

Checklist

Have you:

- ✓ Reviewed the three main ingredients of effective communication?
- ✓ Chosen your words with care to give the right impression?
- ✓ Varied your tone of voice?
- ✓ Adopted appropriate body language?
- ✓ Practiced, practiced, practiced?
- ✓ Made arrangements to receive feedback on your performance?
- ✓ Incorporated the information from that feedback into your future presentations?

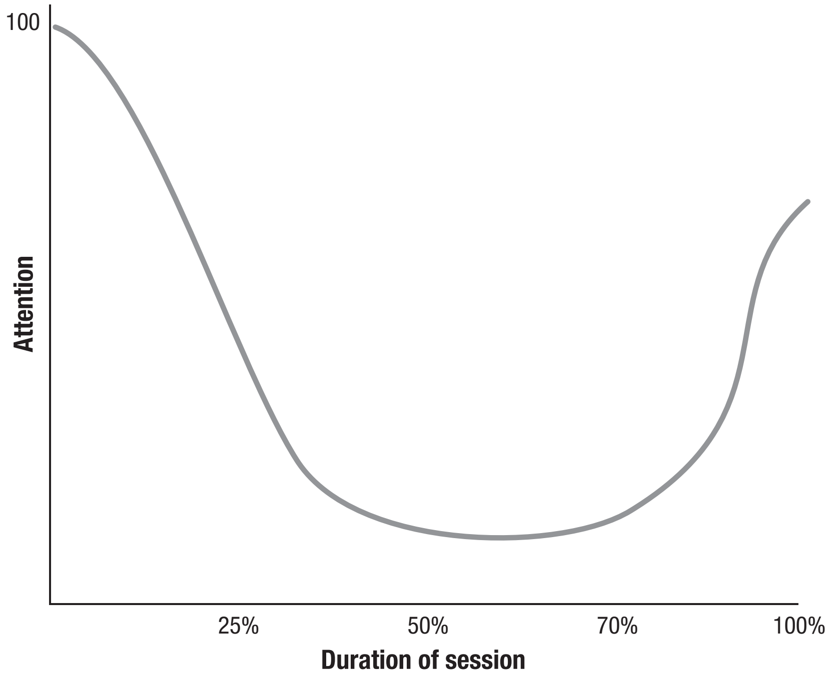
Chapter thirteen

Developing training skills

Introduction

This chapter will introduce you to the skills and techniques involved in asking and handling questions from a group of trainees. By the end of this chapter you be able to:

- Identify the main advantages and disadvantages of asking questions in a training session
- Recognize the main types of questions and demonstrate skills in using them
- Ask and answer questions effectively
- Explain a technique for answering questions
- Demonstrate skills in using this model



Audience attention curve

Researchers have identified that for most conventional teaching presentations audience interest is high at the beginning, declines rapidly in the middle and perks up again when the presentation comes to an end. In this chapter we want to explore methods you can use to engage and maintain the interest of your trainees during the whole presentation.

Lectures

The standard lecture or presentation is one of the most common forms of training.

The main characteristics of a typical lecture or presentation are:

- Mainly one-way communication
- Relatively ordered and controlled
- Generates little rapport
- Can be difficult to follow
- Covers a lot of information in a short space of time
- Difficult to challenge or clarify.

Typically questions and interaction are only allowed at the end.

Some of the problems of leaving it so late are that:

- It is difficult to break the ice at such a late stage
- Some of the trainees will have fallen asleep
- They have forgotten what they wanted to ask
- Some will feel embarrassed to speak in front of a group
- Many lecturers demeanour suggested they didn't really want any questions.

So how could the trainer generate rapport and stimulate interest?

- By asking and encouraging questions throughout and at set intervals.

Whatever your questioning policy it is good to tell the participants what it is at the outset.

A

Activity point

Why should we use and invite questions? What are their main benefits? Write down your answers and compare them with our suggestions below.

Questions can:

- Break the ice and start a dialogue
- Help check knowledge and understanding on what's been covered
- Gives trainees more confidence in their ability to use the material

- Satisfy special needs and interests of individuals
- Provide you with a guide to trainee's initial knowledge on the topic
- Involve the group at an early stage
- Stimulate the trainees to think things through
- Be used to encourage reluctant participants to talk
- Help explore attitudes, opinions and feelings
- Introduce group participation and variety
- Maintains trainees interest in the mid-session lull
- Use the groups knowledge
- Make sure you're not boring them by telling them things they already know.
- Channel the session in a particular direction
- Give the trainer feedback on how well they are doing
- Provide a means of assessing progress to date
- Stimulate active learning ensuring greater understanding and retention of the material.

A

Activity point

What would you say were the main disadvantages of having an open questioning policy?" Again write down your own answers and compare them with our list.

- It may prove difficult to handle the group
- The atmosphere may become disorderly and noisy
- You may get led off at tangents and not cover your training points
- One person may dominate and answer all the questions
- It can be time consuming, taking longer to cover your material
- Trainees with an action oriented learning style may become frustrated
- Gives the opportunity for the self-opinionated to 'get on their soap-box'

- The trainees may lack knowledge and feel they have nothing to contribute
- They may hold back from fear of the reaction of other trainees or the trainer themselves
- They frustrate you by only providing wrong or 'stupid' answers.

Whilst these difficulties should always be bourne in mind, one of the challenges to trainers is that you have to manage the process and create a successful learning climate.

Questioning

What are the main types of questions and what are their uses?

Open *"What are the main types of problem you encounter in your job?"*

Purpose: To explore and gather information. They give the individual an opportunity to open up the discussion and raise any concerns they may have.

Closed *"Do you have any problems with the new computer network?"*

Purpose: Help to establish facts and information. Usually answered with a precise answer, for example *"Yes"*.

Probing *"What do you think are the main causes?"*

Purpose: To get more detail on a point you want further information about. To challenge ideas and stimulate thinking.

Hypothetical *"Suppose we revised the manual to show on-screen examples, what effect would that have?"*

Purpose: To explore new ideas. A non-threatening way of testing your own opinions.

Leading *"And you wouldn't want that to happen would you?"*

Purpose: Tells the individual what you think they're thinking. Take care, you could tell them what to think.

Multiple *"So do you think the causes are poor maintenance or inadequate training? Is it because the workload is too high or is it down to poor supervision? What impact would it have if we drew up a precise user's schedule?"*

Purpose: Could confuse the individual and are a habit best avoided. Split them up and use the parts one at a time for maximum effect.

How to ask questions

Activity point

Think back to your school days. What annoying habits did your teachers perform when they were asking questions in class?"

Among people's pet hates most will recall 'The Pounce'. This is usually a wake-up call and puts the receiver in the spotlight before they know what the question is. It goes something like:

> *"Jones! Answer me this boy. What's the difference between an x and a y?"*

The other variation on this theme is called 'Pose, Pause, Pounce' where the teacher asks the question, looks around the room, sees Jones has, yet again, fallen asleep, and names them as the victim from whom they want an answer.

> *"What's the difference between b and c? …… Jones?"*

Whilst both of these approaches can be useful, success will depend very much on how well the trainer manages the climate.

An alternative approach most commonly used by trainers is 'The Overhead'. Here the trainer asks the question to the whole group and waits for a volunteer to answer. This has the benefit of stimulating the whole group who are unsure who is to answer.

What should you do if you ask a question and no one answers? You've paused and still no one answers. What options are open to you?

Potential solutions could include:

- Re-phrase – ask it again another way
- Repeat – put the question back to them again
- Pounce – name an individual who knows the answer but is keeping quiet
- Expand – put it into an example or analogy
- Break it down – it may have been too complex, sub-divide it into smaller chunks
- Give them a hint – jog their memory back to when it was covered
- Give them the answer – it's not a guessing game, they may not know or have genuinely forgotten.

Other problems that may happen when you are handling the replies include:

- The correct answer comes very quickly
- The answers is always provided by the same person
- The answer is wrong
- The phrasing is woolly, but they got the gist of it.

A

Activity point

How would you manage these situations. Note down your answers and compare with our suggestions below.

Possible answers include:

A Don't confirm straight away. Bounce it off the other members to check what they think.

B Use method A. Start pouncing on other members. Divide the participants into small groups and take one answer per group.

C Acknowledge any part of the answer that's right and give credit for that part. Ask the rest of the group to fill in the missing steps.

D Invite someone else to re-phrase. Paraphrase what you think they have been saying and check out your accuracy.

How to answer questions

The show-off question

- Be careful it may be their attempt to help
- Congratulate them on their knowledge
- Answer briefly or offer it for general discussion

  "That's an interesting point, what does anyone else think?"

The irrelevant question

- Be careful to protect their ego
- Answer briefly and move back to your topic, or
- Tell them why you think it's irrelevant and move on

The over technical question

- Have them translate for the benefit of the audience
- Ask them to Re-phrase it (a variation of above)
- You paraphrase to help the audience understand
- Pass it to a more expert colleague who can answer
- Ask the questioners to answer themselves

The very simple question

- Protect their ego, don't ridicule them
- Answer the question, or
- Redirect to others

(It may be simple to you but if one's asking there may be others in the group who didn't grasp this point first time around.)

The private interest question

- Say you can see why they'd be interested in this area
- Check to see if other participants are also interested
- If many are, then answer
- If not, suggest you'll answer privately, and at greater length, later

The funny/humorous question

- Acknowledge the humour
- Take care not to be drawn into a 'music-hall' exchange
- Throw it out to the whole audience, or
- Move on quickly

The statement

- Point out that it's a statement of their opinion not a question (it's usually a proposition for you to agree with)
- Put it back to the questioner
- Throw it to the rest of the group for comment

The test question

- Can be designed to probe your knowledge or a show-off question (see above)
- Give a straightforward answer
- If you don't know, don't bluff
- Pass it to an expert colleague
- Promise to find an answer and report back
- Throw it to the group, but take care any answer may be incorrect

How do you answer a direct question?

- Answer the question yourself
- Bounce it back to the questioner
- Redirect it to the rest of the group
- Re-direct to a named individual in the group
- Refer it to an expert colleague
- Admit ignorance and promise to find out later
- Defer and deal with privately afterwards
- Postpone and deal with later in the session

We have seen that answering a question yourself is only one way of handling them. If you adopt this approach then try our **TRACK** approach for optimum success.

How to answer questions

T Thank them for answering

R Repeat the question

A Answer

C Check back

K Keep control

T **Thank them for answering**. Be genuine and show you really do welcome questions from the group.

R **Repeat the question** for all to hear and to show you understand. Make sure you don't manipulate what they have said just to suit your own purposes.

A **Answer.** Talk directly to the questioner and use your peripheral vision to keep an eye on the rest of the group. Reply fully and honestly.

C **Check back.** Make sure they understand and /or accept your reply.

K **Keep control**. Get back on track to your next teaching point.

That's the structure but you also need to think about the process. This will involve:

Developing the art of the pause

- Don't be in a hurry to answer
- Be patient, let the questioner finish before answering
- Ask yourself, why are they asking this question?
- Has the rest of the group heard and understood the question?
- How far can you go in your reply:
  - Without covering ground out of sequence?
  - Without loosing too much time?
  - So that the others can benefit?
- Think about your choice of words. Keep it succinct and simple
- Be courteous and sincere
- Remember that how you deal with the questioner will have an impact on your relationship with them and the rest of the group.

- Be conscious of your body language.
- Look down, adopt a thinking but unruffled posture.
- Look up when you are ready to reply.

Using questions is a key technique when you are facilitating a discussion, either as the manager trying to resolve a work based problem for which there is no clear, obvious solution, or the trainer leading a session which is encouraging the participants to use thinking and critical reasoning to 'discover' the main learning points for themselves.

For trainers, lecturing and telling the group what to think are ineffective methods if they want to form or change attitudes. Involving the participants in a well-run discussion can become a powerful way of gaining commitment to change through the exploration and public commitment to opinions. Don't forget the old Chinese proverb:

"Give a man a fish – he can feed himself today
Teach a man to fish – he can feed himself and his family for life."

What's going on in a discussion?

When any discussion, either formal or informal, is taking place then activity will be happening at three different levels:

- **Structure**
- **Content**
- **Process**

The structure: covers the stages a group goes through to deal with a task or problem.

The content: covers the topic under discussion, the main ingredients of the task or problem the group are trying to resolve.

The process: covers how the individuals in the group interact with each other as they work through the task or discussion.

Trainers who pay too much attention to any one strand of activity are unlikely to be as effective as those who are aware and take conscious steps to maintain an appropriate balance between all three.

Planning your discussion

Most training managers will agree that to perform any function successfully they first need to prepare. Remember the 6P's acronym: *Proper Planning and Preparation Prevents Poor Performance*.

Tips for effective planning of a discussion include:

The content

Do your research

Find out all you can about the topic. What have others done? Did this resolve the problem? How close a match was their task to yours? Read widely around the subject and talk to other people.

Clarify your objective

Why are you leading this discussion? Is this the best way of achieving your objective? What result should be achieved by the end of the discussion?

Know your constraints

Most discussions are bound by some terms of reference. These may be challenged during the discussion so you need to be clear about what you can and can't cover. What recommendations are going to be acceptable?

Assemble relevant background material

Do you need to remake as an OHP? Will the discussion be more effective if the group receives the material in advance? Arrange your material in a logical and suitable order.

The structure

Prepare a preliminary discussion outline

How will you introduce the topic? Is there an appropriate problem-solving model that suits this topic? What are the main steps to achieving a successful outcome? How much time is available for each step and overall?

Make the physical arrangements

Make sure that all the background material including any handouts and visual aids are ready. If you are using any equipment, does it work? Do you know how to work it? Arrange the room to assist the discussion, not hinder it. It is difficult to have a free flowing discussion in a classroom set-up or in your office. Move to neutral territory and sit in a circle so participants can all see each other.

The process

Think about the participants

How many will there be? Is this number too few or too many to run an effective discussion? Discussions work best with smaller groups, if you get into double figures you may want to split into smaller groups and have a plenary review of their findings.

How are they likely to think and feel about the topic and participating in a discussion?

Are there likely to be any conflicts? What can you do about this?

What's my preferred leadership style?

How will this affect the proceedings? How can I make sure that I can create the best learning atmosphere, one of co-operation and support, in which participants feel free to contribute.

Consider some stimulating questions that can get the discussion underway

Think about how you could handle possible reactions to sensitive or difficult areas.

Think about the roles you want people to play

Will you actively participate? If so, what effect will that have? Will you facilitate and, if so, in what style? Are you going to have observers? If so, what should you brief them to look out for?

How will you make interventions?

There are two distinct styles. You can decide which one is appropriate for this group, or adopt a mixture of both.

Intervention styles

Style	Participative and supportive	Directive and challenging
Behaviour:	Proposing Seeking information Building Bringing In Supporting Summarizing	Giving Information Disagreeing Shutting out Testing understanding Defending/attacking

Definitions and examples

Category	Definition	Examples
Proposing	A behaviour which puts forward a new suggestion, proposal or course of action	"Let's deal with that one tomorrow." "I suggest that we reduce the number of security guards by 15%."
Building	A behaviour which is usually in the form of a proposal, which extends or develops a proposal made by another person. "…and your plan would be even better if we added a second reporting stage."	"You suggest that we should try to raise money to buy now. Let me make some suggestions about how we might raise that money." "If I can take that further we could also use the system to give us better cost control."
Supporting	A behaviour which makes a conscious and direct declaration of agreement or support for another person or his concepts and opinions.	"Yes, I go along with that." "Sounds OK by me." "Fine." "I accept that."

Category	Definition	Examples
Disagreeing	A behaviour which states a direct disagreement or which raises objections and obstacles to another person's concepts or opinions. **(N.B. Disagreeing is about issues.)**	"No, I don't agree with that." "I don't like the idea one bit." "Your third point just isn't true." "What you're suggesting just won't work."
Defending/ Attacking	A behaviour which attacks another person either directly, or by defensiveness. Defending/attacking behaviour usually involves value judgements and often contains emotional overtones. **(N.B. Defending/ attacking is usually about people not issues.)**	"That's rubbish." "…and your third point is either incompetence or a lie designed to damage and denigrate." "Don't blame me, it's not my fault, it's his responsibility…"
Testing Understanding	A behaviour which seeks to establish whether or not an earlier contribution has been understood.	"Can I just check that we're talking about the same thing here?" "So, can I take it that we all now agree on this?"
Summarizing	A behaviour which summarizes, or otherwise relates in a compact form, the content of previous discussions or events.	"Gentlemen, we have agreed • to take legal action • to take it before May • to issue a holding writ in the Chairman's name."

Category	Definition	Examples
Seeking information	A behaviour which seeks facts, opinions or clarification from another person.	"What's the time?" "Can anyone tell me which page this is on?" "Have you checked that thoroughly?"
Giving Information	A behaviour which offers facts, opinions or clarification to other people.	"I remember a case like that last year." "There are at least three down there."
Bringing in	A behaviour which invites views or opinions from a member of the group who is not actively participating in the discussion.	"Jack, have you anything to say on this one?" "Karl has been very quiet; I wonder whether he has anything he would like to say here."
Shutting out	A behaviour which excludes another person or reduces his opportunity to contribute.	JOHN – "What does Hans feel?" KARL – "What I feel is…" Karl is here shutting out Hans. Interrupting is the most common form of shutting out.

Conducting the discussion

Now that you have prepared for the discussion it is time to carry it out. In common with most events it will have a beginning, middle and an end. Each phase will require you to adopt a slightly different approach. Among the points you will need to consider are.

Introducing the discussion

- Start the discussion on time and try to make the group feel at ease. Using their names will assist this.
- Identify the topic clearly and define the scope of the discussion.
- Establish any constraints particularly the timeframe and terms of reference.
- Clarify the topic so that you are all starting at a common point.
- Supply any relevant factual information, verbally or visually (OHP's, charts, graphs etc).
- Establish the structure the discussion should follow and explain your role.
- Clarify any questions they may have before you start.
- Stimulate the initial discussion, using your prepared questions, and then let them continue.

Guiding the discussion

The main approach is to help the trainees explore and make decisions about the content themselves. This should ensure that they recall the main points covered and commit themselves to any action required.

The contents of the approach can be summed up in the mnemonic **KOPSA:**

K Keep the discussion on the defined topic

O Open questions. These will get the participants talking about the issues involved.

P Paraphrase. Check out your understanding and encourage them to think things through.

S Seek alternative views. Invite others to build on what has been said. Pose hypothetical questions. Invite the quiet members to contribute.

A Argue. Make sure any difficulties they may encounter are put forward. Ask for clarification. State any opposing points of view to their proposed course of action.

The style they use to do this is paramount. As a training facilitator you should not be dominating but enabling the participants to reach their own conclusions.

Less effective behaviours

Be on the lookout for less effective behaviours that may sabotage a successful outcome. Examples of this could include:

Steering

You have a conclusion in your own mind and push them towards it.

This can often cause resentment; the participants will question your sincerity and probably withdraw cooperation.

Dominance (either by yourself or others)

Apart for asking the occasional question to keep the discussion going participate as little as possible yourself. Encourage the entire group to participate by controlling the over-talkative members and drawing out those that are shy or inhibited.

Irrelevancies

Keep the discussion on track and deal tactfully with irrelevant contributions.

Remind the group to keep to your planned structure and time indicators. Again posing questions is an effective way of doing this.

Conflict

Debate will result in disagreement.

Participants will raise objections or obstacles to other people's opinions. This is a valid part of discussion but watch out for personal arguments, which usually have strong emotional overtones and involve a direct attack on another person.

Ending the discussion

There are a number of areas you need to consider in reaching a satisfactory conclusion:

Timing

- Have you used up all the time allocated for the discussion? It can be a valuable learning point for groups that are not able to keep to schedule and leave areas unexplored or rushed.

- Don't allow them to start on a fresh point, apply the guillotine if necessary.
- Always allow yourself sufficient time to sum-up.

Summing-up

- It helps to summarize at intervals as well as the end.
- The final summary should cover all the points raised, not just the majority viewpoint.
- You should review the main points of the discussion and the conclusions that have been reached.
- Make your summary concise and to the point, but don't over simplify and miss out key areas.
- Agree what has been agreed and who will action what point.

Closing

- Make sure everyone knows you have finished.
- Once you have closed the discussion down don't let it continue to meander on.
- End on a positive note and give everyone a vote of thanks.

A

Activity point

The next time you facilitate a discussion ask an impartial observer to sit in and give you feedback. They can use either of the below observer review sheets to help facilitate constructive comments after the event.

Observer review sheet 1

Discussion leader's name

___

Topic under discussion

___

Preparation

___

What evidence was there that the leader had prepared sufficiently in advance.

Opening

- Did the discussion get off to a good start?
- Did they appear to have a plan of action?
- Was the purpose of the discussion clarified?
- Were constraints pointed out?
- Did they establish an operating structure – with target timings?
- Did they clarify their own role?

Main body of discussion

Did the leader:

- Control disruptions?
- Keep on the topic?
- Achieve all-round participation?
- Stick to the operating schedule?
- Keep members under control?
- Invite contributions from quiet members?
- Ask open questions?
- Paraphrase to check understanding?
- Seek alternative viewpoints?
- State difficulties with certain proposals?
- Summarize at intervals?
- Keep the group on time?
- Not impose their own solutions on the group?
- Use a facilitative style?

Closing

- Did the leader make a final summary?
- How accurate and complete was the final summary?
- Was the objective of the discussion achieved?

- How definite was the closure?
- Did they sincerely thank the participants?

Main strength shown by discussion leader:

____

____

____

____

Main development need of the discussion leader:

____

____

____

____

Any further comments:

____

____

____

____

____

____

____

____

____

____

Observer review sheet 2

Type of interaction	Leader	Participant 1	Participant 2	Participant 3	Participant 4
Seeking information					
Building					
Supporting					
Giving information					
Testing understanding					
Summarizing					
Defending/attacking					
Bringing in					
Shutting out					
Proposing					
Disagreeing					
Other behaviour (specify)					

Checklist

- ✓ A discussion can be a suitable vehicle for gaining commitment and exploring and changing attitudes.
- ✓ To be effective it must be carefully planned by the discussion leader.
- ✓ The discussion leader needs to be aware of the three strands of activity: content, structure and process.
- ✓ The most effective approach is as a facilitator, in which they guide and support the group, helping them develop awareness of how they are operating.
- ✓ The discussion will move through three stages. The discussion leader will have an important, though changing, role to play in each phase.
- ✓ Learning in the review stage will mainly come from examining how well the group has managed its operating structure and processes issues, rather than revisiting the content.

Blank

Chapter fourteen

On-the-job training

Introduction

By the end of this chapter you will have:

- Differentiated between a wide a range of development options
- Identified the benefits and potential disadvantages associated with on-the-job training
- Completed a task analysis
- Planned a session using a structured model
- Identified your strengths and development needs in using the model

Management means achieving objectives with, and through, the efforts of your staff, the key resource around which all other resources and results revolve. You can have the best systems and equipment available, but your products and services are only as good as the people providing them, which will depend on how well they have been trained in the key skills required to do a good job.

The development continuum

All managerial and supervisory jobs carry a responsibility for people. This includes assisting them in acquiring the necessary knowledge and developing the required skills. Whatever your level, you can't be an effective manager unless you are an effective developer of people.

You will need to choose the best approach from a range of options to help your staff become more effective at work. This range is often described as the Development Continuum (see below).

Managing	Training	Mentoring	Coaching	Counselling	Therapy
Directive					Non-directive
Controlled by manager					Client centred
Task oriented					Process oriented
Focus on results					Focus on healing trauma
Certainty of outcome					No certainty of outcome
Short interaction/timescale					Long interaction/timescale

The development continuum

Managing

At one end of the continuum, the focus is on the manager taking a directive approach to ensure that the individual achieves the performance needed to achieve departmental goals.

Management interventions can be short and to the point – telling the recipient how they should behave. At the other end of the continuum is the very non-directive approach often found in **psychotherapy**. Whilst you are unlikely to come across psychotherapists in the workplace, you will encounter a number of other common techniques – including training, mentoring, coaching and counselling. Although these approaches often overlap, the ability to distinguish between them will enable you to choose the most suitable approach for each individual.

Training

This traditionally involves the wholesale transfer of new skills in, for example, changes in procedures, new systems (such as software application training) or new job functions. Most training programmes are generic and not tailored to individual needs.

Participants generally have to complete standard modules, so the programme is unlikely to be tailored to account for existing knowledge, skills or preferences. Classroom-based training is not always sufficiently similar to the live working environment to ensure effective skills transfer. On-the-job training is a means of avoiding some of these difficulties. It is well suited to the transfer of knowledge and skills, and can use real work situations to develop personal qualities under the guidance of a skilled co-worker.

Mentoring

A mentor has a high level of personal involvement with the person being mentored. The primary focus is often not on the development of technical competence or the giving of advice, but on the acquisition of the largely intuitive skills that allow people to operate effectively at higher degrees of management or in a wide range of different situations.

Mentors will usually be more senior than those they mentor, and will always be more experienced. The approach can be more informal, with meetings taking place as and when the person being mentored needs advice on career and personal development. Mentoring revolves around developing the person being mentored professionally.

Coaching

Coaching at work aims to maximize the contribution and performance of the individual. Its context is the current job. It draws on individual and team experience in order to identify opportunities for improving performance. It involves giving guidance, direction, feedback, encouragement and support, and should be a natural occurrence in the workplace, led by the line manager.

(See Chapter 15 Coaching skills for training managers for further information on this approach.)

Counselling

Counselling is primarily a remedial activity intended to help individuals to come to terms with issues in their personal or working lives. The close friendship that often develops between a mentor and the person being mentored, and sometimes between coach and learner, is specifically avoided in the counselling role. The counsellor must not become closely involved.

The main goal of counselling is to help people understand the root causes of long-standing performance problems or issues at work. It is usually a short-term intervention but it can last for longer, depending on the breadth of issues to be addressed. Counselling can be used to address psychosocial as well as performance issues. The agenda is generally agreed by the individual and the counsellor.

Therapy

Psychotherapy is a range of techniques based on dialogue, communication and behavior change and which are designed to improve the mental health of a client or patient, or to improve group relationships (such as in a family). Therapy may address specific forms of diagnosable mental illness, or everyday problems in relationships or meeting personal goals. Treatment of everyday problems is more often covered by **counselling** (a distinction originally adopted by *Carl Rogers*) but the term is sometimes used interchangeably with 'psychotherapy'. If your staff need this type of intervention we strongly advise you seek appropriate professional help from an internal or external specialist – see British Association of Counselling and Psychotherapy http://www.bacp.co.uk/http://www.ukrconline.org.uk/

Choosing a development style

Business psychologists point out that we usually have a preferred style which we are comfortable using. Choosing the optimum style will depend upon a number of factors:

Your preferences

- Whether you overuse one style.
- Whether you use the appropriate style for the situation.
- Your confidence in your employees' abilities.
- Your confidence in your own ability.

The other person's preferences

- Their level of maturity and perspective.
- Their readiness to assume responsibility for decision making.
- Whether they recognize and welcome the need for development. (If they don't recognize a need, less directive styles will fail.)
- Their previous experience of different approaches.

Level of commitment needed

- Is their commitment essential or can you live with mere compliance?
- Do you have to work with the other person after the problem situation has been resolved?

Your power

- Can you enforce or police your solution?
- If you have no power, directive styles are inappropriate.

Time available

- Non-direct approaches take time.
- Imposing a solution is quick – in the short-term.

The organization

- How are things done?
- What is the organization's style and culture?
- How do the role models in the organization approach development?

Certainty of solution

- Is there only one correct way of tackling a situation?
- Are there a number of equally appropriate solutions?
- (Less certainty usually favours a less direct approach.)

A

Activity point

Use the following quiz to identify which if any of the styles you feel most comfortable with? What might be the consequences of using a style that is different to the optimum style the situation, individual and task requires?

Can you 'flex' your style to best match their needs?

What's my style?

Style	Self-assessment A = I overuse this style B = I use this style when appropriate C = I seldom/never use this style		
Managing	A	B	C
Coaching	A	B	C
Mentoring	A	B	C
Training	A	B	C
Counselling	A	B	C
Therapy	A	B	C

On-the-job training

Training goes on in a variety of settings. It may take place in a specially designed training centre with a group of students using selected examples from real past cases. These courses are often expensive to set up and maintain. If the number of people to be trained at any one time is low, the training is best conducted on a one-to-one basis. You can use a quiet room away from the job, or the desk of the individual being trained. This approach is, after all, called on-the-job training.

Research in the CIPD′ s annual training and development survey reports that on-the-job training was perceived as the most effective means of learning. (See *Training and Development 2005*, available at:
www.cipd.co.uk/subjects/training/general/_trdev2005.htm?IsSrchRes=1.)

What are the benefits?

The advantages of on-the-job training over other methods of training include:

- Quick and easy to set up.
- Does not require any special equipment or premises.
- Training material can be selected from current 'live' cases.
- Immediate transfer of skills back to the workplace.
- Greater flexibility in content and pace of training.
- Allows greater attention and individual feedback.
- An ongoing process, not a one-off relationship.
- Learners are usually highly motivated; they are improving their job and possibly salary prospects.

Possible disadvantages and risks

- The manager/supervisor may not have enough time.
- They may not see it as their job and may reject the responsibility.
- They may not have the necessary training skills.
- They may not have the necessary physical resources to perform the training/instruction effectively.
- The trainee's slow speed of performance may disrupt productivity.

- Learning involves mistakes; customers may become aggrieved or rejection rates may increase.
- Work is about achieving output targets – when demand increases, training becomes low priority.
- Some skills, such as flight training, are best developed in specialized training centres.

Many of these problems relate more to the management of training than to on-the-job training itself. There comes a time when even the airline pilot has to move away from the simulator and fly for the first time.

On-the-job training will work if the organization is committed to making it work, and backs up that commitment with adequate resources, training, monitoring, and recognizing and rewarding the process as a central function of management.

What's involved in on-the-job training?

The precursor to any effective training is planning. The first step involves finding out what staff need to know, using a **task analysis**. Some jobs may be relatively straightforward and can follow a machine-like sequence. Others will require the job holder to make decisions at various points to determine what the next step should be. For a more complex task, construct an algorithm – a diagram that shows a series of steps including decision points to determine the next steps in the procedure.

In order for the trainee to carry out each step successfully, they will need a combination of knowledge, skills and attitude.

How much time do I have?

Your analysis may show that there is far too much material to cover in one session. Trainers often get carried away with their topic and forget they were once novices themselves. Have you ever been bombarded with too much information, too quickly, and ended up confused?

Research shows that people learn best in small steps. Does your training session lend itself to being broken down into bite-sized chunks? Some experts suggest that a trainee will only be able to perform a task which requires less than 20 per cent of the total length of a session. So, in a 30-minute session, you are limited to presenting a 6-minute task.

The training objectives

Defining effective training objectives is central to measuring learning during on-the-job training. A training objective can be defined as *'a precise and concise statement of what trainees will be able to do at the end of the training event.'*

Preparing Instructional Objectives, Robert F. Mager, Kogan Page Ltd, May 1990.

Objectives cover three main areas of performance:

- **Knowledge** – using words like *define*, *list*, *state*, or *describe*.
- **Skills** – using words like *draw*, *construct*, *adjust*, or *reassemble*.
- **Attitudes** – using words like *value*, *accept*, *appreciate*, or *identify with*.

It is particularly hard to measure whether attitudes have been achieved successfully, because you are often trying to identify the external display of an internal process.

What we have discussed so far relates to the trainees' classroom performance (demonstrating they can, or can't, achieve the objective) but, in order to ensure they can transfer learning to the workplace, this performance needs to be complemented by two further elements.

The three parts of an objective

- **Performance** – what is to be done?
- **Conditions** – where will it be done and what environment, equipment or materials will be involved?
- **Standards** – what levels of achievement are required?

The standards can be measured in terms of distance, weight lifted and rate of production, degree of excellence or, indeed, any criterion by which the accuracy of performance can be judged.

This precision is made possible by ensuring that all three parts of the objective are defined. For example:

- **Performance** – At the end of the training event trainees must be able to identify invalid tickets…
- **Condition** – given a rush hour situation...
- **Standard** – with 90 per cent accuracy.

Plan your session

Having identified your objectives you next make a plan for your on-the-job training session. This will involve three stages:

- The introduction.
- The main body.
- The conclusion.

The introduction

The main purpose of the introduction is to prepare your trainee to learn.

Put them at ease:

- Make sure there is comfortable seating and lighting
- Create a friendly atmosphere
- Smile
- Use their name
- Encourage them to talk and ask questions
- Be enthusiastic.

Put the session in context:

- Tell them what the job or task is about
- Tell them how it fits into the wider work of the organization
- Tell them how this session relates to the job and to other sessions.

Find out what they know already:

- Identify any gaps in their knowledge
- Explore similar situations they've been in.

Arouse their interest:

- Explain why this skill or procedure is important
- Explain what they'll gain from acquiring it
- State your objective, give them something to aim at.

Introduce them to all the materials, tools, equipment and terminology they will encounter in the session:

Check to see how familiar they are with them.

The main body

The main purpose of this section is to help your trainee to learn. This will be made up of the various key stages into which you have sub-divided the whole task.

We suggest the following five-part approach to help maximize learning:

1. Show the overall task

- Complete the overall task
- Follow precisely the procedure you identified in your task analysis.
- Talk to the trainee, establishing the critical points throughout.
- Summarize at the end.

This puts all the stages into context and gives the trainee a mental picture of what they have to do.

2. Show the first stage

- Present one step at a time.
- Work through slowly and clearly.
- Stress the key points, correct procedure, and safety features.
- Make connections between what you are doing and the trainee's past experience.

3. Check understanding

- Repeat the first stage, with the trainee telling you what to do at each step.
- Ask questions that get them thinking.

- Check that they understand why you are performing in this order.
- Correct any errors as they occur, and go over the correct procedure.
- Encourage them to ask questions.
- Summarize the whole operation in a quick second run-through.

4. Part practice

- Let the trainee work through each individual stage.
- Have them tell you what they are going to do before they do it.
- Ask questions to establish they know why they are doing it that way.
- Encourage them to ask questions throughout.
- Give praise and constructive feedback.
- Have them do the task again, without having to tell you about what they are doing. Help them review their performance.
- Repeat the task with several different examples.
- Check their confidence and competence.

5. Whole practice

- The trainee now completes the whole process.
- Help them review their overall performance.
- Return to part practice for areas that are incomplete or need special attention.
- Repeat whole task with several different examples.
- Start with simple cases and work up to more difficult ones.
- Remind the trainees that *'practice makes perfect.'*

This will emphasize the need to keep moving through the part/whole practice loop until they can complete the entire task satisfactorily, without the need for close supervision.

The conclusion

The main purpose of the conclusion is to help the trainee to remember and apply their learning.

- Issue any notes or manuals.
- Check whether trainees found any of the steps particularly difficult.
- Identify where, and to whom, they can go for further help.
- Summarize the whole process they have covered.
- Ask for any questions on the process.
- Point out that this is the best method from a number of possibilities.
- Explain why some alternative methods have been tried but rejected.
- Check whether they have discovered any new or different techniques.
- Try out methods suggested by the trainee. Do they produce acceptable results?
- Suggest that they keep an open mind about any possible improvements.
- Briefly review the required job performance standards for time, quantity, quality and safety.
- Check if there are any questions.
- Close the session.

During this final phase, use a more facilitating approach. Having taught the basics you will be encouraging the trainee to really think about the context of their job and to aim to develop new ideas. This improves commitment and gives them the opportunity to try out their thoughts in a relatively safe environment.

Put learning into practise

A

Activity point

Use the material you have developed to train a typical candidate to successfully complete a task to the required standard. Consider what's achievable within the time available. You should aim for the trainee to practice for at least a third of the session.

We suggest that you appoint an impartial observer who can help you review and learn from this practice session.

Observer: Observe the practice activity. Make notes on the attached observer's sheet. When the practice has finished lead a review of the Managers performance. Give constructive feedback. Invite the Manager and trainees to both discuss their views of what was effective and where improvements could have been made.

On-the-job training – Observer's sheet

Manager: ______________________________

Trainee: ______________________________

Topic taught: ______________________________

Time started: ______________________________

The introduction

- Put the trainee at ease
- Put the session in context
- Found out about the trainee's experience
- Aroused their interest
- Introduced them to all the materials used in the session

The main body

1. Show the overall task
   - Demonstrated the whole process
   - Completed on time and to standard

2. **Show the first stage**
   - Presented one step at a time
   - Worked through slowly and clearly
   - Stressed the key points, correct procedure, safety features
3. **Check understanding**
   - Performed the task following the trainee's instructions
   - Corrected any errors as they occurred
   - Demonstrated the correct procedure
   - Summarized the operation in a second run through
4. **Part practice**
   - Encouraged the trainee to work through each stage
   - Asked the trainee to describe what they were going to do
   - Asked questions to establish the trainee knew why they were doing it
   - Gave praise and constructive feedback
   - Had them repeat the task without a description
   - Asked them to review their performance
5. **Whole practice**
   - Got the trainee to complete the whole process
   - Helped them review their overall performance
   - Had them repeat areas that were not up to standard

The conclusion

- Briefly revised critical steps and key points
- Asked for suggestions on new ways to do the task
- Explained why some alternative methods have been rejected
- Reviewed the required job performance standards for time, quantity, quality, safety etc
- Checked if there were any final questions

Finish time: ______________________________

Comments on training style:

____

____

Major strength:

____

____

Major development need:

____

____

Conclusion

Learning is a lifelong activity and a two-way process. You really start to learn and develop your own knowledge and understanding when you pass your expertise on to someone else.

Checklist

Have you:

- ✓ Established that on-the-job training is the most effective intervention, by reviewing the advantages and disadvantages of this approach?
- ✓ Analyzed the task and written down the key steps that the trainee will need to perform?
- ✓ Written objectives of what the trainee will be able to do, to what level and under what circumstances, by the end of the training?
- ✓ Drawn up a session plan that has an introduction, main body and conclusion?
- ✓ Included the five key parts in the main body to help maximize learning?
- ✓ Put your plan into practice by undertaking a pilot or trial run?

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Chapter fifteen

Coaching skills for training managers

Introduction

What is coaching?

What are the benefits of effective coaching?

Creating the right climate for coaching

The coaching model

The coaching discussion

Suspend judgement

How do I introduce coaching into my organization?

Checklist

Introduction

By the end of this chapter you will be able to:

- Identify what coaching is
- Define coaching in the workplace
- Know when coaching should take place
- State the benefits of effective coaching
- Create the right climate for coaching
- Use the coaching model an a coaching discussion
- Manage the process – make full use of your skills and style
- Introduce coaching into your organization
- Assess your current level of coaching activity

Finding ways to develop and evolve your key personnel to meet changing needs is a challenge that faces every organization.

Difficulties in tracking individual improvement and ROI for conventional training means that more and more organizations are turning to professional executive and corporate coaching for senior and middle managers.

Recent studies show that when combined with coaching, training is at least 20% more effective than the same course without coaching. Coaching increases personal productivity and improves motivation, and is ideal for executives who are successful but want to aim higher. A successful coaching partnership is composed primarily of one-to-one interactions between a professional coach and one of your executives.

Coaching is an increasingly popular tool for supporting personal development. Almost eight out of ten respondents in the CIPD *Learning and development survey 2006* reported that they now use coaching in their organisations. Of these four fifths say that their organisation is seeking to develop a coaching culture. http://www.cipd.co.uk/surveys. Coaching can be delivered by external coaches, full-time and part-time internal coaches who may be line managers, or members of the HR department.

What is coaching?

Coaching has a 'business' rationale – the improvement of performance and results. It is also recognized as the most cost effective way of developing staff. But it also helps to satisfy the needs of the individual. Effective coaching comes from recognizing that in the end a person can only be helped to help themselves and from the conviction that helping someone else to develop their potential is one of the most rewarding of a manager's tasks.

For managers new to coaching using a reliable structure for their coaching helps build confidence. Knowing how to build rapport and engage the job holder are essential skills, and together they make for successful coaching conversations. The main underlying approach of any coaching interaction is one of honesty, sincerity and a genuine interest in the other person.

One of your prime responsibilities as a training manager is the coaching and development of your staff. But it is often the most neglected of managerial duties; you have only to consider how rarely in your own career you have served under a boss who has consistently been good at coaching you and encouraging your development, to realize the truth of this statement.

Given the significant benefits that coaching produces for managers, staff and the organization, this is surprising. One of the points that could be holding managers back is that although they have the desire they lack the skills and knowledge to be a coach, but like so many other areas of managerial responsibility, these can be learned.

Another obstacle is the often voiced question, 'How can I find time for coaching?' This question is often coupled with the remark, 'We have a job to get on with'. However, if you accept the opening statement that coaching is a prime responsibility of the manager, then if you do not find time for coaching you are simply not managing effectively.

Defining coaching

A definition of coaching is:

'The ***continuous process*** of ***developing*** an individual's performance by using ***day to day work*** to provide ***planned opportunities*** for ***learning*** under ***guidance***.'

The important elements of this definition are:

- *Continuous process* – coaching is not just a one-off event but demands ongoing commitment from both parties to make it work.
- *Developing* – the aim of coaching is to help the individual to perform their current role more effectively as well as to help them realize their long-term potential.
- *Day to day work* – provides an ideal choice of environment to develop the individual. It can be immediate and overcome many of the problems associated with off-the-job courses, e.g. time, expense, relevance, etc.
- *Planned* – involves a systematic approach to take the individual through the various stages of the learning cycle.
- *Opportunities* – it needs you to recognize the large number of opportunities that occur in any job and use them to provide individuals with new experience.
- *Learning* – what developing and improving is all about. It will equip the individual with the necessary knowledge, skills and attitudes that will enable them to choose the appropriate behaviour and action in a wide variety of changing circumstances.
- *Guidance* – you are involved in guiding your staff by providing positive feedback. You encourage insight and development by asking questions, listening and probing, rather than by telling your staff what to do.

When should coaching take place?

As already stated, coaching should be a continuous process. Every facet of the relationship between you and your staff and every personal contact is potentially an opportunity for coaching. The following are a few of the many opportunities which you can take to exert a coaching influence:

- Every time someone asks for advice or asks a question
- When there is a work problem
- When improvement or development of a product/process/ service is necessary
- A change of job or a change within a job
- Planned delegation of part of your job
- Providing job cover holidays/sickness etc
- An individual or group project
- Through membership of a committee or working party
- When action plans are being devised to meet objectives
- Agreed action at the end of an appraisal discussion
- On return from a training course.

What are the benefits of effective coaching?

The benefits are numerous to all involved in the coaching process:

a) To you
  - More effective delegation, saving time and improving team output.
  - More responsible/innovative involvement from staff.
  - New systems operational more quickly with fewer mistakes.
  - Better communications, more openness in discussing performance.
  - Own promotion prospects enhanced by ability of successors.

b) To your staff
  - Improvement in current performance.
  - Improvement of advancement prospects.
  - More self-reliance.
  - Opportunities to direct activities towards areas where greater strengths and interests lie.

c) To the organization
- Higher level of achievement of its objectives.
- More reliable knowledge of the capacity of the total staff resource.
- Opportunities to set more realistic objectives.
- Better information on which to base planning for the future organization and manpower requirements.

What should be your attitude towards coaching?

Given all of the advantages, your attitude should be very positive. However, it is important that you learn to put yourself in your staff's shoes. Otherwise coaching may seem to them to be nothing more than inquisitions and pep talks. So you must be prepared to listen as well as talk and to show that you can listen to their ideas without feeling insecure or losing your self control. The effective coach is 'long' on questions and 'short' on answers someone who guides the subordinate to deduce for themselves, rather than someone who preaches.

There are also certain danger areas you should avoid, such as criticisms of someone's personality, characteristics or personal values which put them on the defensive. The aim should be to build upon their strengths. Above all you need to remember that people are individuals and respond in different ways. Coaching has to be tailored.

Creating the right climate for coaching

You also need to create the right climate for coaching under which both parties feel comfortable to operate. This climate will be one in which:

- Clearly defined goals are mutually understood and agreed upon.
- Examination is allowed to take place, questions to be asked and feedback to be given.
- Experimentation is encouraged, so that ideas are tried out and thinking is developed.
- Mistakes are permitted, that is, they are positively viewed as events for learning and not criticism.

- Personal and cultural differences are respected, so that you do not try to develop a replica of yourself but allow personal growth to happen.
- Personal feelings are treated as legitimate and relevant to learning, because if left unrecognized and unacknowledged they will prohibit risk taking and new ideas being tried.
- Both parties trust in each other and are accepting of each other.
- Emphasis in the relationship is on collaboration and not competition.
- Recognition of effort and achievement is given, carefully measured and tailored to the individual. Too much can embarrass and annoy some while too little can discourage others.

The coaching model

Whilst the coaching itself will need to be tailored to the individual, there is a well recognized structure to the whole process – the six step model:

Step 1 – identify the need

This involves identifying the gap between actual performance and required performance, by monitoring outcomes against objectives, by observing the level at which competences are being demonstrated. As soon as you identify a need, you should be considering what action, including coaching, to take. Appraisal discussions are an ideal opportunity to identify an individuals needs but as they generally occur once a year, are best suited to looking at longer term developmental needs. Short-term needs should be addressed as the occur.

Step 2 – recognize the opportunities

A list of typical opportunities for coaching which typically arise from day-to-day work has been given above. You and your staff should always be on the lookout for potential opportunities. There will be times when you will be able to look ahead and identify special projects but much coaching is often done at short notice and not planned in advance. You should develop an awareness of the opportunities presented by a new or unexpected challenge.

Step 3 – hold the coaching discussion

How you run the coaching discussion will have a strong bearing on the success of the coaching project. Too much direction will come over as an autocratic style, which the employee will find constricting. Too little involvement and they will think you have no interest in the outcome. They must be allowed to do it in their own way, your role being that of a facilitator, using your expertise to help them anticipate problems and get the best from the opportunity.

(Details of how to run an effective coaching discussion are given below.)

Step 4 – carry out the activity

This is the essential ingredient of any coaching project. It is what makes the difference between education and training. You are giving the individual the opportunity in a real work setting to tackle a task and try out new skills and techniques.

You will have agreed at Step 3 how much support and when and why you will intervene during the activity. You need to handle this stage with great care. You don't want to take over and do the job yourself, but this can be difficult when you feel you could be doing the job better yourself. The main thing is to let the individual get on with the task in their own way. If you are always taking over from them how much are they going to learn?

Step 5 – review the learning

This is the essential step in any learning process. In order to gain the most from any experience you will need to make time to stop and take stock of what happened. There is a tendency to only do this if something has gone wrong. This should be avoided and a full review taken whatever the outcome.

How you debrief the individual will have a strong impact on the quality of the learning. Managers often feel that they have to jump in and start to take over at this point. A more effective approach is a facilitative one – which initially encourages the individual to self-appraise. That's not to say that you do not give feedback, but you need to do it carefully and skilfully.

What has happened should have been a learning experience for you as well. Think about what you have learned about yourself as a coach. Would you do things differently in the future? Good coaches always aim to get better.

Step 6 – plan the next step

This step will involve returning to other needs identified in Step 1. What needs are still to be addressed for the future? The whole philosophy underpinning coaching is that learning is a lifelong activity and should be viewed as a continuous process.

The coaching discussion

As with the coaching model, the coaching discussion will need to be tailored to suit the individual, their character, their needs, etc. However, the discussion can be based on the following model:

- Phase 1 Open the discussion
- Phase 2 Explore the current situation
- Phase 3 Investigate alternatives
- Phase 4 Gain commitment
- Phase 5 Close the discussion

Phase 1 – open the discussion

This is an important first step in the coaching process. If done effectively, it will help to build rapport, set the tone and establish the direction of the discussion.

A successful opening will:

- Put the individual at their ease
- Agree the purpose of the discussion and emphasize the developmental nature of the discussion
- Clarify the needs, wants and concerns of the individual

- Establish any ground rules, such as confidentiality, note-taking, separation from other organizational procedures, etc.
- If you manage the opening well, the discussion will be a positive and helpful event.

Phase 2 – explore the current situation

Building on a positive opening will continue to establish the developmental nature of the discussion. You should:

- Jointly explore what is going well in the job and why.
- Encourage the individual to assess their own performance.
- Help them identify what could be improved.
- Analyze the problems/issues thoroughly.
- Identify specific examples of effective and ineffective behaviour.
- Agree a priority order of development needs.

If the discussion is run along these lines there will be less likelihood that the individual will think that this is some form of rebuking session and clam up as a result.

Phase 3 – investigate alternatives

This phase needs careful handling and you must resist falling into the authority trap where you start to take over and impose solutions on the individual.

You should work with the individual to:

- Encourage suggestions.
- Discuss how they will meet the identified need.
- Probe for additional (better?) suggestions.
- Help clarify ideas fully.
- Highlight difficulties and resource implications.
- Help generate alternative solutions to blocks.
- Draw fully on the individual's experience.
- Challenge assumptions and biases.
- Present facts and information about options.

- Make suggestions but do not impose them.
- Develop options and alternative actions.

Phase 4 – gain commitment

The work done so far will go a long way to gaining commitment rather than just compliance. If Phase 3 has been carried out well it is likely that too many choices will have been generated. You will now need to help the individual narrow these down into a small number of workable choices.

You should help the individual to:

- Focus on priority needs.
- Identify a specific development plan.
- Establish a clear first step.
- Decide who needs to be informed by whom.
- Clarify levels of authority needed.
- Agree a monitoring and review procedure.
- Establish your role in the process.

Phase 5 – close the discussion

For the discussion to be handled effectively, it must come to a positive end. This will be your final opportunity to emphasize the developmental nature of the discussion, and to ensure that the individual sees it as a positive and helpful experience.

You should:

- Check that everything has been covered and that the individual doesn't have any questions.
- Start by summarizing the purpose of the meeting and the objectives.
- Ask the individual to summarize the main discussion and their action steps – summarize their own involvement in what happens next.
- Clarify and make a written note of when you are going to monitor and follow up.
- Thank them for their active participation in making the discussion such a success.

A

Activity

Coaching model – A self assessment

This activity requires you to rate your current level of expertise in each of the five phases of the model using the following scale:

1. Outstanding
2. Very effective
3. Competent
4. Not proficient, improvement needed
5. Either – considerable improvement needed or – no opportunity to judge.

Name:______________________________ Rating:________________

PHASE 1. Open the discussion

PHASE 2. Explore the current situation

PHASE 3. Investigate alternatives

PHASE 4. Gain comment

PHASE 5. Close the discussion

You can revisit your rating after the skills practice involved in the next activity.

1. Manage the process – make full use of your skills and style

Your skills

The essential skills required so that the coaching discussion becomes a dynamic two-way dialogue rather than a monologue can be broken down into three separate components. A mnemonic for them is **QuIP**: **Qu** – question, **I** – interest, **P** – Perception.

Qu Use a wide range of **questions** designed to get job holders talking about their development needs.

I Show **interest** in what the job holder has to say.

P Check out the job holder's **perception** of what they say so both parties learn from the conversation.

Asking effective questions

There are six main types of question:

Open:	*What are the main types of problem you encounter in your job?*
Closed:	*Do you have any problems with the new computer network?*
Probing:	*What do you think are the main causes?*
Hypothetical:	*Suppose we revised the manual to screen examples, what effect would that have?*
Leading:	*And you wouldn't want that to happen to you?*
Multiple:	*So do you think the causes are poor maintenance or inadequate training? Is it because the workload is too high or is it down to poor supervision? What impact would it have if we drew up a precise users' schedule?*

The purpose of questions is to:

- Get people to talk
- Get people to give information
- Allow people to think problems through
- Help people to a new understanding.

All these outcomes are vital for the manager coach to be able to develop sufficient information to be able to focus on positive results. Coaching is done by finding out what the job holder needs to know. Initially, it is necessary to explore what they know about a problem, identify what they have done to resolve it and help them to think through how they can move forward to a successful resolution.

The behaviour which uses the skills of questioning is called *inquiring*.

2. Interest – show them you're listening

There are a number of behaviours we display when we are listening to someone. These can be summed up by the mnemonic SOLER which stands for:

Sit up and face the individual

Squarely face the individual – you won't convey interest in what they're saying if you are facing away.

Open posture – this demonstrates you are open to their ideas and haven't put up any mental barriers.

Lean forward – slightly, without invading personal space. This will signify interest.

Eye contact – maintaining comfortable eye contact without fixing them with a frightening stare.

Relax – avoid distracting behaviour such as fidgeting, thumbing through papers, playing with paper clips, etc.

3. Perception

The third skill that helps to develop an effective coaching discussion is responding. This is the behaviour which helps you to share your perceptions and demonstrate to the job holder that:

- You are really listening
- You have understood what they are saying
- You understand how they are feeling
- You want to encourage them to start to build towards a solution
- You have suspended judgement.

Key responding techniques include:

a) *Paraphrasing* – restating in your own words the basic ideas involved in what they have been saying.

b) *Reflecting* – putting back to the person what you have picked up about how they are feeling about what's been going on.

c) *Summarizing* – pulling the important threads of ideas, facts, and feelings together and establishing a basis for further discussion.

d) *Focussing* – making a decision together on the future of the discussion.

Suspend judgement

Experience shows a key element of effective coaching is that it's not just what you say; it's also how you say it that's of equal importance. It is crucial that all these skills are put over in a genuinely non-judgemental way, maintaining an attitude of openness.

Signs that you are not suspending judgment include:

- Being too quick to reject what the other person is saying
- Thinking too much about what you are going to say yourself rather than really listening to the job holder
- Interrupting to give irrelevant information not needed to solve the problem
- Talking at tangents about unrelated topics
- Taking over the conversation to talk about yourself
- Giving a judgment on the appropriateness of the job holder's behaviour.

A

Activity

Coaching skills and model – practice

Working with a group of managers, divide into threes. During this activity you will play the following roles in turn:

1. The manager

The role of the manager is to use each phase of the coaching model to help the job holder to review a current problem suitable for exploration in this exercise. During the discussion the manager should use the model to facilitate the job holder's development.

2. The job holder

The job holder will be assisted by the manager to review his or her strengths to resolve the problem. The manager will help the job holder to identify any development needs for managing similar situations in the future.

3. The observer

The observer should watch to see how effectively the manager is able to use the coaching model in discussion with the job holder. The observer should make notes of specific examples of both good and less effective practice so that they are able to give the manager some constructive feedback when the discussions have come to an end.

The observer should be given a review sheet before the activity begins.

Method

The manager helps the job holder to explore any current concern, problem or decision they have to make that is a suitable topic for this exercise. For example:

- Making better use of my time
- Managing my boss
- Motivating a difficult subordinate
- Getting change accepted
- Making meetings more productive
- Matching work and home demands
- Developing my career
- Accepting early retirement or redundancy
- Handling conflict at work
- Focusing a newly formed team
- Any other current management/work problem of your choice

After 20 minutes stop the discussion. The manager then summarizes what the job holder's position is at that time. That marks the end of the discussion phase of the exercise.

The observer leads a review. Discuss how accurate the summary was and what the manager did that helped or hindered. What were the difficulties experienced? How does the job holder feel about the process? What could the manager do to improve their skills in using this approach? The review should last about 10 minutes.

Each round will last approximately 30 minutes.

Observer's review sheet

Phase 1: Open the discussion

Effective	Less effective

Phase 2: Explore the current situation

Effective	Less effective

Phase 3: Investigate alternatives

Effective	Less effective

Phase 4: Gain commitment

Effective	Less effective

Phase 5: Close the discussion

Effective	Less effective

Review

Reconvene asking each to focus on the content of the activity and to review the main points gained. Was their own assessment of their skills in using the coaching model (completed in the earlier activity) borne out in practice? Where were the main areas of difficulty and what helped them to overcome them?

How do I introduce coaching into my organization?

Suggestions for introducing coaching include:

Coach your positive staff first

Set yourself up for success by starting with an easy target. This will give you the opportunity to practice your skills and make it easier to move on to your other staff.

Work on the climate

Work towards creating a climate in which feedback is encouraged, both ways, and praise becomes the norm.

Link to performance appraisal

Most systems look forward at developing the individuals' personal development as well as their task performance. It provides a perfect opportunity to introduce a more development-orientated culture.

Arrange an individual meeting

Discuss your ideas with another member of your team. Elicit their suggestions and gain their support and commitment to some of the changes you both want to make. This could be your boss, a co-worker or one of your staff.

Team meeting

Call a staff meeting and openly seek support for what you want to do. Use creative problem-solving techniques, such as brainstorming, to get the groups suggestions on how to move forward. Act as a model facilitator, go with the flow and don't manipulate or impose your views.

Covert introduction

Many of the techniques could be introduced without any formal announcement. It involves you in modelling appropriate behaviour. As relationships improve you can slowly, openly address the issues you have been working on.

Away day

This has many of the features of the team meeting, but is usually run off-site, at a hotel over a couple of days for example. Someone who is seen to be objective can externally facilitate it. This free's you to become part of the process. This helps to ensure the group takes ownership rather than it always being you that drives the change.

Assessing your current level of coaching activity

It may be that you are already using coaching techniques, and having defined the term and placed coaching in context with managing and other approaches to help individuals, the following questionnaire will give you an insight into your current level of coaching activity.

Coaching questionnaire

1. How much time do you spend in a typical month coaching and developing your staff?

2. How often do you sit down with your staff to constructively review their performance?

3. What approach do you usually take when one of your staff asks for advice on how to solve a problem?

4. What plans do you make to deal with your work when you are away from your office for any length of time?

5. How much time do you spend discussing with a member of staff how they can put into practice what they have learnt when they return from a training course?

6. For how many of your staff do you have a written performance improvement plan which identifies training and development goals?

7. How would your staff rate your commitment to their coaching and career development?

Checklist

- ✓ Effective coaching comes from recognizing that in the end a person can only be helped to help themselves.
- ✓ It's based on the conviction that helping someone else to develop their potential is one of the most rewarding of a manager's tasks.
- ✓ For managers new to coaching, using a reliable structure for their coaching helps build confidence.
- ✓ Knowing how to build rapport and engage the job holder are essential skills and together they make for successful coaching conversations.
- ✓ The main underlying approach of any coaching interaction is one of honesty, sincerity and a genuine interest in the other person.
- ✓ Coaching should be a continuous process. Every facet of the relationship between you and your staff and every personal contact is potentially an opportunity for coaching.
- ✓ Given all of the advantages, your attitude should be very positive. However, it is important that you learn to put yourself in your staff's shoes. Otherwise coaching may seem to them to be nothing more than inquisitions and pep talks.
- ✓ Whilst the coaching itself will need to be tailored to the individual, there is a well recognized structure to the whole process – the six step model.
- ✓ The essential skills required so that the coaching discussion becomes a dynamic two-way dialogue, rather than a monologue, can be broken down into three separate components: questioning, showing interest, sharing your perception.
- ✓ It is crucial that all these skills are put over in a genuinely non-judgemental way, maintaining an attitude of openness.

Chapter sixteen

Choosing and managing training consultants

Introduction

By the end of this chapter you will be able to:

- Define what a training consultant is
- Identify why should you use them
- Decide how to make a choice
- Recruit a training consultant
- Agree your contract
- Monitor their progress
- Confront problems
- Identify what action to take when the consultancy project has finished

What is a training consultant?

"A consultant is someone who charges you to borrow your watch to tell you the time, and then keeps your watch." Anon.

A consultant (from the Latin consultus meaning 'legal expert') is a professional who provides expert advice in a particular area of expertise such as finance, information and communications technology, human resources or marketing. Most organizations now employ external training consultants, either as an added resource to complement their internal training team, as their main method of training delivery, or to undertake specific projects.

One main distinction of a consultant is that they are not employed by their client, but instead are in business for themselves or a consultancy firm, usually with a number of clients. This enables you to have access to deeper levels of expertise than would be costly for you to retain in-house, especially if the speciality you are considering employing them for is rarley needed.

How do training consultants work?

A consultant provides expertise to clients who require a particular type of knowledge or service for a specific period of time. Companies implementing a major project may need additional experienced staff to assist with increased work during that period. Management consulting refers to both the practice of helping organizations to improve performance through analysis of existing business problems and development of future plans.

Training and management consultants are often criticized for overuse of buzzwords, reliance on management fads, and a failure to develop executable plans that can be followed through. Further criticisms include:

- analysis reports only
- junior consultants charging senior rates
- reselling similar reports to multiple clients as ‘custom work’
- total lack of innovation
- overbilling for days not worked
- speed at cost of quality
- unresponsive large firms and lack of (small) client focus
- lack of clarity of deliverables in contracts, and more.

...In defence of consultants

“The best servants of the people, like the best valets, must whisper unpleasant truths in the master’s ear. It is the court fool, not the foolish courtier, whom the king can least afford to lose.”

Walter Lippmann (1889 – 1974) United States writer, journalist and political commentator.

Why should you use them?

- You can use their business know-how to tackle the problems and challenges your business faces.
- They provide an outsider’s view of how your business works.
- You may have a clear understanding of both the problem and the possible solutions, but lack the time or the specific training to address these issues effectively.
- To bring in expertise which you and your workforce do not currently possess.

When should you use them?

- When you are drawing up a business plan.
- When your business faces a particular challenge.
- When you want to find new markets.
- When you want to implement a new system in your company.

They will be most effective if you give careful thought beforehand to what you want to achieve, why you want to use people from outside, and the timescale and costing for the work.

How do you make a choice?

A lack of regulation and consistent accreditation has meant that the services delivered by consultants can vary in range, depth and quality. When considering potential consultants, it is useful to assess the manner in which they conduct both their business and their professional relationships with clients. The following approach will help you make a well-informed choice.

Define what you want them to do

Before trying to identify a suitable consultant it is important to draw up an initial brief for the work. This could be anything from a short outline of the problem you want to address, to a more elaborate description of the proposed work, complete with provisional costings and a timetable.

Firstly identify what needs doing. You can then set a timeframe and a budget for the consultancy. Your brief should include:

- A description of your organisation: its purpose and values, what it does, its size and structure.
- The need or problem that has led you to consider using an external consultant and why you think this need or problem exists.
- What you want the consultancy to achieve.
- When you want the work to start and when you expect it to finish.
- Any provisional budget for the work.

- A description of the kind of people you want to engage: their values, experience, knowledge, skills and personal perspectives.
- A deadline for submission of proposals.

The brief should be checked out with others in your organization to ensure there is broad agreement about what the work is expected to achieve and what sort of person is sought.

A

Activity point

Use our checklist to draw up a brief for a training project you are considering offering to a training consultancy.

- Describe your organization: its purpose and values, what it does, its size and structure.
- Identify your need: the problem that has led you to consider using an external consultant.
- Define your objectives: what you want the consultancy to achieve.
- Clarify your timetable: when do you want the work to start and to finish.
- Specify you provisional budget for the work
- Draw up a description of the kind of people you want to engage: their values, experience, knowledge, skills and personal perspectives.
- Identify a deadline for submission of proposals from the consultants.

Recruiting the training consultant

Look for a consultant who suits your circumstances and:

- has experience of businesses of your size;
- understands your industry;
- has experience of any particular issues you want to deal with;
- holds any necessary qualifications; and
- is a member of a recognised professional body or trade association.

How do you find a range of consultants to choose from?

- Network with colleagues in your organization, and in others.
- Go to organizations for help. Business Links and Chambers of Commerce usually hold lists of providers.
- Use the web. Look for directories and discussion forums where you can post enquiries and recommendations.
- Think local. The consultancy industry is notoriously fragmented; plenty of excellent providers work in local consultancies or as sole traders.
- Size isn't everything. Never judge a provider solely by size or location. Seek out some smaller consultancies, networks and individuals to balance the bigger providers.
- Professional associations usually hold lists or a register of approved or accredited members.

Short-list potential providers

Once you have collected information about potential consultants you will need to draw up a short-list for interview. The purpose of this stage is to explore in depth your needs and their suitability.

For large tenders try two stages to avoid a large number of consultants putting a lot of time into preparing tenders, which only one will win. In the first stage, up to ten interested people are asked to send in a short amount of information under given headings. You then select a short-list of three or so. These are invited to go on to the second stage which involves doing a full tender document, with a different, more detailed set of headings. Some or all of these people may then be invited for interview.

For shorter pieces of work written proposals or telephone interviews may be used to gain more information about the person and the general approach they might take.

What should I ask them?

The kinds of questions you might ask for work of any size or type include:

- Would you be interested in taking on this work?
- Would you be interested in submitting a tender for the work based on the written brief?

- Are you available on the dates or in the timescale required?
- What kind of work have you done before that is relevant to this consultancy assignment?
- What kind of approach do you take in general, and what approach would you take to this work?
- What relevant skills or expertise do you have?
- What values or principles underpin your work?
- How do you demonstrate your commitment to equality of opportunity?
- Would you be directly involved in doing the work, or would you pass it on to someone else? If the latter, how would the person be chosen?
- What are your systems for quality assurance?
- How do you review and evaluate your work?
- What are your fees for work of this type? Will VAT be charged?
- What additional costs would you anticipate as expenses?
- Do you have the appropriate professional indemnity or public liability insurance?
- Can you provide referees for similar work you have done?

In order to ensure that you are getting value for money when recruiting you should follow the ten rules on selecting and using the right consultant for your business on the Institute of Management Consultancy (IMC) website:
http://www.imc.co.uk/consultants/choosing_using.php

1. Clearly define the objectives that you hope to achieve.
2. Consult with others in your organization to agree those objectives.
3. Short-list no more than three consultants, and ask them to provide written proposals.
4. Brief the consultants properly.
5. See the individual consultant who will do the job and make sure that the 'chemistry' is right.
6. Ask for references from the chosen consultant(s) and follow them up.

7. Review and agree a written contract before the assignment starts.
8. Be involved and in touch during the assignment.
9. Ensure that the consultant does not save surprises for the final report.
10. Implement the recommendations and involve your management as well as the consultant.

Make your selection

For most assignments it is important for you and other relevant people in your organisation to meet them before making a final decision. The number of consultants you meet will depend on:

- The time and money involved in the work.
- The time and money involved in pre-meetings.
- How many of those short-listed meet your essential criteria.
- Your preferred process for deciding whom to hire.

The meeting should be well planned. If you are meeting several consultants ask them to make a presentation about how they would tackle the work and what they see as the key issues.

These meetings are the opportunity for:

- A discussion and negotiation of your needs.
- Explore the details of how they might be addressed.
- The skills required, the costs, timetables and any constraints.
- Help you to assess the consultants' general approach, values, skills, experience and integrity.

The way the consultants behave and the quality of their presentation and written materials are useful indicators of how the consultancy itself is likely to proceed. Confirm that the person you are meeting will be doing your work, rather than a colleague who may be less experienced.

Your original brief will provide the basis for assessing whom you should hire. Evidence for choosing who to work with will come from your personal contact through phone calls, meetings, written information such as brochures, CVs and tenders and references or recommendations from other people.

You need evidence that the consultant has achieved results elsewhere. Their willingness to share previous successes – and failures – with you not only makes a statement about their competence, but also informs you about the importance they place on achieving results rather than simply managing a process. You also need them to commit to agreeing and achieving measures of success for you.

You can decide whether prospective consultants are suitable by asking yourself:

- Are they really listening to you?
- Are they helping you to explore and understand the issue better?
- Are they interested in your situation?
- Are they meeting your needs or merely selling their product?
- Are they happy to be challenged – do they encourage it?
- Are they clear about how they will tackle the job?
- Are they keen to agree and achieve measures of success?
- Will they complement your team and organizational culture?

Agree your contract

Once you have made a decision, the agreements arrived at should be incorporated into a written contract which covers both the work which will be done and the conditions under which it will be done.

As a starting point, the contract should include information under the following headings:

- The work to be done.
- The person(s) who will be delivering the work.
- The person who is the lead contact in the organization.
- The timescale and deadlines for the stages, if relevant.
- The fees to be paid.
- What expenses will be charged for, and at what rate.
- Whether VAT is included in the fees and expenses or will be added.
- When invoices will be presented and when they will be paid.

- Any required insurances.
- The work to be done by the organization, e.g. arranging meetings, photocopying.
- Copyright of written and other creative materials.
- How and when the work will be reviewed and what will happen if either party is dissatisfied.
- Arrangements for postponement or termination by the organization (proportion of fees and timescales).
- Arrangements for postponement or termination by the consultant (through illness or emergencies).

The contract should be clear and any standard terms clearly explained. You may want a professional adviser to review the contract, depending on the nature of the consultancy or the amount of money you have at your disposal.

At the end of the contract you will want to measure how valuable the consultancy has been to your business, so you must ensure that the contract and brief are made up of clearly measurable aspects.

A

Activity point

Use our suggestions to draw up a draft contract

- Identify the work to be done.
- Name of the person(s) who will be delivering the work.
- Name the person who is their main contact in your organization.
- Clarify the timescale and deadlines for the stages.
- Stipulate the fees to be paid.
- Clarify what expenses will be charged for, and at what rate.
- Is VAT included in the fees and expenses or will it be added?
- Dates when invoices will be presented and when they will be paid.
- Required insurances.
- State the work to be done by the organization, e.g. arranging meetings, photocopying.

- Clarify copyright of written and other creative materials.
- State how and when the work will be reviewed and what will happen if either party is dissatisfied.
- Identify the arrangements for postponement or termination by the organization (proportion of fees and timescales).
- Clarify the arrangements for postponement or termination by the consultant (through illness or emergencies).

Monitoring progress

You need to set a timetable and establish a process for evaluating your relationship with consultants as soon as they start. You could build regular updates or status reports into the process. Establishing criteria for measuring progress against goals and objectives will give you a clear idea of how the consultancy is proceeding.

In all consultancy assignments there are three aspects that you can evaluate:

- **The product:** This might be the action points agreed at a review meeting, the final draft of a business plan, the new structure document or the final report on the work.
- **The process:** These are the tasks or activities undertaken in order to achieve the desired outcomes and the way they are carried out. These can be reviewed while they are happening in order to change them. Reviews at the end will assist in deciding whether to do it that way again in the future.
- **The outcomes:** Evaluating what happens as a result of the work falls into two categories: evaluation of changes to what you do after the work, and evaluation of the results of those changes.

If the stages described above are followed then the framework for this monitoring and evaluation of the work should be in place. This would include clarity as to:

- What is to be achieved and success criteria.
- Stages in the process.
- Products of the work.

- Agreed ground rules (e.g. confidentiality both internally and externally to the organisation, to raise concerns as soon as they occur).
- How and when reviews of the work will happen (e.g. at the end of each milestone and in the middle and at the end of the contract).
- Agreements on how any concerns will be dealt with. This is likely to be by the lead contact person and those involved in management and review of the work.

Because situations change, it may prove necessary to modify the brief during the course of the consultancy. Both you and the consultant should be flexible enough to adapt the work if this is necessary.

Managing the relationship

You should establish a process for managing your relationship with the consultant. This should include:

- How often you need to meet
- Tasks to be undertaken by you or members of your staff
- Definitions of interim targets
- Definitions of milestones
- Agreement on deliverables

Your active involvement is crucial to the success of the consultancy. Managing a client/consultant relationship can be hard work. You should achieve a good relationship between you and your consultant if you communicate frequently throughout all phases of the project and you are open and honest with each other.

Regular meetings are a good opportunity to discuss:

- What progress the consultant is making
- What they need to know to continue
- What problems they are encountering
- Whether your needs or situation have changed in a way that might change the assignment.

In most cases it is best if the consultant reports to only one person, either yourself or a person within your organization nominated by you. This ensures that communication is clear and misunderstandings should not arise. However, you should keep your staff informed about what the consultant is doing, as their input will be invaluable.

You should also retain an option to terminate the consultancy if you feel progress is not satisfactory.

Confronting problems

Even the best-planned consultancies can go wrong. The following actions may help to resolve problems before they become a major issue:

- Raise concerns early and obtain the views of relevant colleagues in the organization and from the consultant.
- Refer back to the contract and the brief.
- Be clear what you need to remedy the problem.
- Use the monitoring and review processes you have set up.
- Convene a special meeting of the group managing the contract.
- Consider whether this type of dissatisfaction is a pattern for you in your work with consultants. If so, what causes it?
- If the dissatisfaction is becoming intractable, seek third party advice.

There are a number of reasons things could go wrong. A lack of effective communication about the direction of the project or setting expectations too high or too low may cause problems. There could also be a lack of follow through on small yet important details, or the consultant may have failed to understand your requirements.

The consultant may simply prove incompetent, and you should not hesitate to challenge work you consider sub-standard. You may ultimately have to consider terminating the consultancy if the difficulties cannot be resolved and this should be one of the key areas in your terms and conditions.

When the consultant has finished

Every consultancy should have a clear ending. Your contract with the consultant might specify that the consultancy will end on a fixed date, or when a defined piece of work is completed. Other consultancies are open-ended but should be regularly reviewed to ensure they are still meeting your needs.

At the end of the consultancy period it is important to evaluate if the consultancy has proved beneficial to you. You can do this by measuring the successes and failures against your original objectives.

The consultant may well have recommended new working practices or procedures. You may find it takes time to absorb these and implement their recommendations and shape your future plans. As one of the deliverables you should ask the consultant to document all work thoroughly before the end of the consultancy project. This means you will always have something concrete to refer to in the future.

Conclusion

A training consultant is an individual hired to give professional advice or services for a fee. They can provide advice on how to make your business more successful and are usually brought in to help deal with a specific problem or task. They will be most effective if you give careful thought beforehand to what you want to achieve, why you want to use people from outside your organization and the timescale and costing for the work. Your active involvement is crucial to the success of the consultancy. Aim to achieve and maintain a good relationship with your consultant and communicate frequently throughout all phases of the assignment.

Checklist

- ✓ Draw up an initial brief for the work. This could be anything from a short outline of the problem you want to address, to a more elaborate description of the proposed work, complete with provisional costings and timetable.
- ✓ Look for a consultant who suits your circumstances and has the necessary background, experience and qualifications.
- ✓ Network with colleagues in your organization, and go to external organizations for help.
- ✓ Draw up a short-list for interview designed to explore in depth your needs and their suitability. Your original brief will provide the basis for assessing whom you should hire.
- ✓ Review the evidence for choosing who to work with will come from your personal contact through phone calls, meetings, written information such as brochures, CVs and tenders; and references or recommendations from other people.
- ✓ Once you have made a decision, the agreements arrived at should be incorporated into a written contract which covers both the work which will be done and the conditions under which it will be done.
- ✓ Ensure that the contract and brief are made up of clearly measurable aspects.
- ✓ Set a timetable and establish a process for evaluating your relationship with consultants as soon as they start. Build regular updates and /or status reports into the process.
- ✓ You may ultimately have to consider terminating the consultancy if difficulties cannot be resolved and this should be one of the key areas in your terms and conditions.
- ✓ At the end of the consultancy period it is important to evaluate if the consultancy has proved beneficial to you. You can do this by measuring the successes and failures against your original objectives.

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Chapter seventeen

How do I evaluate the effectiveness of training

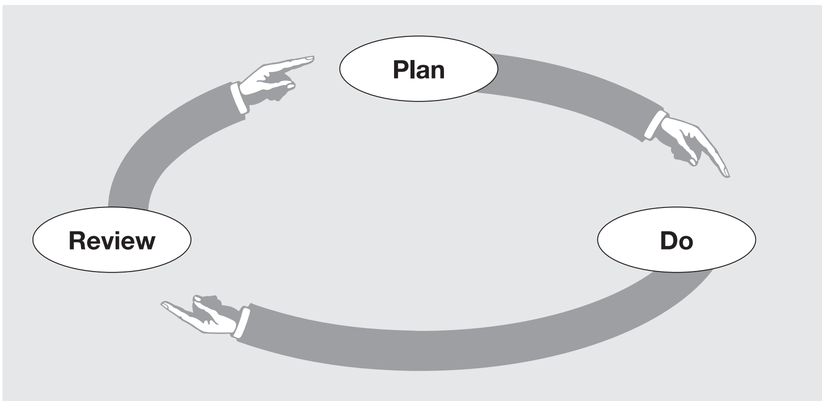
Introduction

By the end of this chapter you will be able to:

- State the reasons why training and development should be evaluated
- Specify the four levels at which training is usually measured
- Use a structured approach to conduct an effective interview at the appropriate stage
  - Pre-course
  - Post-course
  - Evaluation (usually six month stage)
- Developed an action plan to incorporate best practice into your current training and development responsibilities

Imagine you were about to start a time consuming and expensive work related project, one that involves taking risks and possible failure in front of other people. What would you do before the project started? Would you plan and set yourself up for success? The usual answer is *"Yes. We'd take time and care to prepare ourselves for the event."*

When working on projects, managers use a simple working model of the learning cycle:



The learning cycle

Most training events are potentially hazardous. Yet how much time is spent, at each of the three stages above to make sure the training will be effective? Most will admit – not a great deal. Some will have experienced the cycle on the event, but how much time and attention is spent in the crucial phases before and after.

Setting the trainees up for success

Most trainees will respond better to any learning activity if they have been adequately prepared before the event. Consider the benefits of a pre-activity discussion and establish the contents of such a briefing.

The cost of meeting training needs can be high. These can include:

- The trainer and trainees salary
- Materials and equipment
- Accommodation costs
- Travel and subsistence
- Deputizing costs
- Opportunity costs
- Support services costs
- Residential accommodation

It is important that managers make the maximum use of this investment then training should be seen to be a natural extension of the working environment. A pre-course briefing will help break down the barriers and emphasize the practical relevance of the course.

Some of the benefits to be gained from spending time having a pre-course discussion include:

- It lets the trainee know what's expected of them on the course.
- They can explore the relevance to their current job.
- You can identify where it fits into long-term development.
- You can focus on key issues on the syllabus.
- You can identify and provide any pre-event support (time, materials, guidance etc).
- Plan who will take over the trainee's duties in their absence.
- Make the training more relevant by identifying work examples that they could use as model problems on the course.
- It will make sure that we get value for money from the event, as time on the course will be better spent.

If a manager is to brief their staff effectively they must be prepared to do some research before even choosing the event. This will help to make sure it meets the individual's needs and fills their training gap.

The training manager also has a role to play in making sure that the line manager has sufficient, accurate material to make the exercise valid.

A

Activity point

Select at random a number of training brochures. Allow yourself a few minutes to read each. Can you identify what items in the brochures are the essential knowledge a trainee needs? Is there any information missing about the course?

Take care! A number of commercial brochures are heavy on sales talk but low on essential knowledge. Most brochures will identify:

- Title of course
- Venue
- Costs
- Dates
- Travel information
- Training objectives
- Session titles

Additional information, which is sometime harder to find about the event includes:

- Style of dress
- Food and refreshments provided
- Who the course is designed for (grade, level of expertise, job title etc)
- Pre-requisite knowledge
- Any pre-course preparation, including materials the trainee should take
- Description of subjects and in what depth they are covered
- Training methods used
- Ratio of trainees to tutors
- Background of other trainees

- Materials supplied with the course
- Evening work
- Planned follow-up activities

In addition to these 'facts' they will also need to cover other points with the trainee:

- What course has been arranged for them?
- The course content.
- Administration details.
- Why they need to attend the course.
- The benefits they and the organization will gain, both short-term and long-term.
- What help they want with pre-course preparation.
- Any fears or apprehensions about the course.
- Any travel or domestic problems caused by the course.
- The internal financial arrangements, e.g. cash advances.
- What any hotel and out of pocket allowance covers or doesn't.
- Any reporting back arrangements.
- What help they will get and from whom, to apply their learning on return.
- What arrangements you will make to enable them to brief others in the organization about the event.

A

Activity point

Take some time to develop a pre-course briefing form to be used by the trainees and their line manager. Issue instructions that this form is to be completed and posted to the training department before attendance on any course. Make sure that you follow-up every application to make sure that every trainee has had this discussion and completed this form.

Our sample training course briefing form gives you some ideas about what to include.

Training course briefing form

Part A
Pre-course agreement

To be completed by the course participant and their manager at a discussion meeting before attending the course.

Course title ______________________________

Course date(s) ______________________________

Name of participant ______________________________

Grade and division ______________________________

Name of manager ______________________________

1. How does this course relate to your current or future work?

____

____

____

____

2. What do you want to achieve by attending this training course?
    1. ______________________________
    2. ______________________________
    3. ______________________________

3. What support will you need (from your manager or others) when you return to work to implement these objectives?

____

____

____

____

4. How will you, your manager or your department know that you have achieved any or all of the above objectives?

____

____

____

____

5. Dates for post course review ______________________

SIGNED: Participant: ______________ Date: ________

Manager: ______________ Date: ________

(Please send a copy of this form to the training manager five working days before the start of the training event.)

Part B
Post-course debrief

To be completed by the course participant and their manager at a debrief meeting after attending the course.

To what extent were the objectives identified on Part A of this form addressed and met on the course?

____

____

____

____

What other benefits have been gained?

____

____

____

____

How will you apply the knowledge, skills and understanding gained on the course within the department?

____

____

____

____

What support do you need to apply your learning from this course?

____

____

____

____

SIGNED: Participant: ____________________ Date: ___________

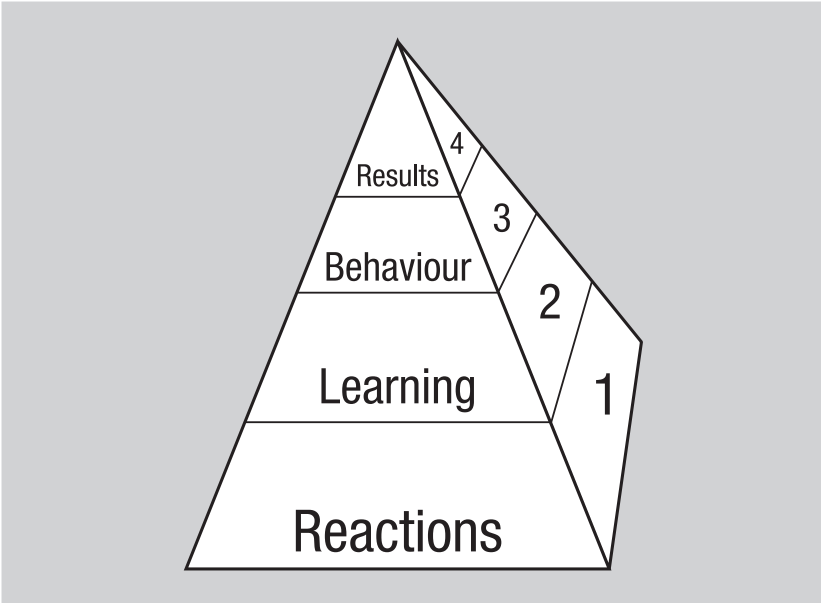
Manager: ______________________ Date: ___________

(Please send a copy of this form to the training manager no later than five working days after the end of the training event.)

Now that the trainee is properly briefed it is time to turn to the event itself.

Levels of evaluation

There have been a number of studies that have looked at how we can evaluate the worth of any learning event. The most popular of these identify four areas for investigation:



Kirkpatrick's training evaluation model

Level	Measurement focus	Question addressed
1. Reaction	Trainees perception	What did the trainee think of the training?
2. Learning	Knowledge/skills gained	Was there an increase in knowledge/ skill level?
3. Behaviour	Worksite implementation	Is the new knowledge/skill being used on the job?
4. Results	Impact on the organization	What effect did training have on the organization?

A

Activity point

Spend some time thinking about your own knowledge, skills and attitudes in relation to each of the above. Rate yourself on your current level of competence (using a five point rating scale) for each step.

Steps to effective training

Step one	Identify the training need
Step two	Design/choose the training/ development intervention
Step three	Implement the event
Step four	Follow-up the training/development
Step five	Evaluate the outcome

Rating scale:

1 = Outstanding

2 = Very good

3 = Acceptable

4 = Not up to standard required

5 = Very poor

When you have finished your self-rating discuss your ratings with someone who's opinion you respect. Explore the evidence you used to arrive at your rating for each step.

Now prioritize your needs and identify an action plan you can use to develop the skills and knowledge required to become more proficient in each step.

Made popular by the work of Donald Kirkpatrick (see *Evaluating Training Programs: The Four Levels* by Donald L. Kirkpatrick, Berrett-Koehler, Dec 1994). In Kirkpatrick's four-level model, each successive evaluation level is built on information provided by the lower level.

The first two levels occur on the training course, the latter back at work after the training.

LEVEL 1: Reaction

This level of evaluation provides us with information on the quality of the trainees' experience. It tends to be short-term and subjective and can give an indication of those parts of the course that the trainee suggests need alteration. They also contain feedback to the trainer on the popularity of the learning methods and provide information on the efficiency of the call-up and domestic arrangements (quality of accommodation, food etc).

The reactionnaire is very popular but often provides little in the way of value if it is the only approach used to evaluate training. What information will a questionnaire give us during and at the end of the course? Our suggestions are:

- Ratings of course
- Ratings of instructors
- Satisfaction

Essentially we are trying to get at the learners' views on how the programme is affecting them so that the information that they offer can be used as feedback for the tutors. For the information to be useful it must be specific.

Questions such as the following are very common but often don't produce useful information because they are not sufficiently specific.

How would you rate the course overall?	Bad 1 2 3 4 5 Good
Did the course meet your objectives?	Yes 1 Some 2 No 3
I found the course intellectually demanding	Agree 1 2 3 4 5 Disagree

A more useful format is to list all the topics on the programme, for example:

Circle the number which in your opinion is the most appropriate according to the following scales:

Almost all the information was new	1 2 3 4 5	Told me little that I didn't know already
Presentation needs no improvement	1 2 3 4 5	Presentation needs much improvement
Appropriate time allowed for topic	1 2 3 4 5	Inappropriate time allowed for topic

Selection methods					
Learnt from new information	1	2	3	4	5
Trainer's presentation skills	1	2	3	4	5
Time allowed	1	2	3	4	5
Comments/suggestions for improvement:					

Employment law					
Learnt from new information	1	2	3	4	5
Trainer's presentation skills	1	2	3	4	5
Time allowed	1	2	3	4	5
Comments/suggestions for improvement:					

Interviewing skills input					
Learnt from new information	1	2	3	4	5
Trainer's presentation skills	1	2	3	4	5
Time allowed	1	2	3	4	5
Comments/suggestions for improvement:					

Interviewing practice					
Learnt from new information	1	2	3	4	5
Trainer's presentation skills	1	2	3	4	5
Time allowed	1	2	3	4	5
Comments/suggestions for improvement:					

The trainees should be encouraged to make open-ended comments on the form. Any expression of 'difficulty' should be followed up to discuss why.

With a particular session more detailed feedback might be required for example.

What is your overall reaction to the session on employment law?

Very good	Good	Fair	Poor

Will you be able to use the material/info/skill in your job?

Frequently	Sometimes	Rarely	Never

How do you think the session could be improved?

____

____

____

If the intention is to obtain more detail on rating the tutor or guest speaker then you could include a separate section on each e.g.

Name of tutor/guest speaker:____________________

Title of session:____________________________

Please tick the appropriate box and provide supporting comments:

	Yes	**No**	**Comments**
Maintained a good pace			
Kept to the subject			
Knowledgeable			
Enthusiastic			
Created interest			
Involved the group			

So that people who like to write pithy comments have the opportunity to do so we suggest that you also ask questions on 'hygiene' factors, e.g. what did you think of:

- The administration of the programme – distribution of material, assistance to participants, etc?
- The accommodation – bedrooms, training rooms etc?
- The food?

It is unlikely that you will learn anything new from the answers to such questions. Participants, however, do like to have the opportunity to grumble and why not? Standards of food, accommodation and so on can deteriorate over time if hotel accommodation is being used and this type of information may well be very useful for external course organizers.

A

Activity point

Have a look at our sample course evaluation sheet. What alterations or amendments will you make when designing your own training course reaction sheet?

Course evaluation sheet

Course title: ______________________________

Course dates: ______________________________

Course venue: ______________________________

Participant name:

Position/Pay band/Grade: ______________________

Contact details

Address: ______________________________

Phone/fax: ______________________________

Email: ______________________________

As part of our commitment to quality and continuous development we would be grateful if you could spend some time completing the following evaluation form.

Session: Management and leadership						
Learned very little	1	2	3	4	5	Learned a great deal
Very poor value	1	2	3	4	5	Excellent value
Comments/suggestions for improvement:						

Session: Employment law and equal opportunities						
Learned very little	1	2	3	4	5	Learned a great deal
Very poor value	1	2	3	4	5	Excellent value
Comments/suggestions for improvement:						

Session: Managing through persuasion and influence						
Learned very little	1	2	3	4	5	Learned a great deal
Very poor value	1	2	3	4	5	Excellent value
Comments/suggestions for improvement:						

Session: Building effective teams						
Learned very little	1	2	3	4	5	Learned a great deal
Very poor value	1	2	3	4	5	Excellent value
Comments/suggestions for improvement:						

Session: Managing time		
Learned very little	1 2 3 4 5	Learned a great deal
Very poor value	1 2 3 4 5	Excellent value
Comments/suggestions for improvement:		

Session: Managing stress		
Learned very little	1 2 3 4 5	Learned a great deal
Very poor value	1 2 3 4 5	Excellent value
Comments/suggestions for improvement:		

Learning methods and materials

Tutor input and facilitation		
Tutor name:		
Very poor	1 2 3 4 5	Excellent
Comments/suggestions for improvement:		

Handouts		
Very poor	1 2 3 4 5	Excellent
Comments/suggestions for improvement:		

Training videos		
1. "I'd like a word with you"		
Very poor	1 2 3 4 5	Excellent
2. "From no to yes"		
Very poor	1 2 3 4 5	Excellent
3. "Can you spare a moment?"		
Very poor	1 2 3 4 5	Excellent
4. "More bloody meetings"		
Very poor	1 2 3 4 5	Excellent
Comments/suggestions for improvement:		

Questionnaires		
1. Adair – ACL		
Very poor	1 2 3 4 5	Excellent
2. Conflict style		
Very poor	1 2 3 4 5	Excellent
3. Belbin		
Very poor	1 2 3 4 5	Excellent
4. Insight 360 degree feedback		
Very poor	1 2 3 4 5	Excellent
Comments/suggestions for improvement:		

Training venue and administration		
Pre-course information		
Very poor	1 2 3 4 5	Excellent
Pre-course administration		
Very poor	1 2 3 4 5	Excellent
Training rooms		
Very poor	1 2 3 4 5	Excellent
Accommodation		
Very poor	1 2 3 4 5	Excellent
Bedrooms		
Very poor	1 2 3 4 5	Excellent
Food		
Very poor	1 2 3 4 5	Excellent

Comments/suggestions for improvement:

Overall reaction to training event		
Learned very little	1 2 3 4 5	Learned a great deal
Very poor value for money	1 2 3 4 5	Excellent value
Comments/suggestions for improvement:		

Please use the section below to add any additional comments and suggestions for improvement.

Please return this form to the training and development department by:

LEVEL 2: Learning

This aims to provide us with information on the amount of learning the trainee has gained during the training programme. It can also provide feedback to the trainee to help them proceed around the learning cycle and feedback to trainers on the effectiveness of the methods used. Measuring learning usually involves methods such as examinations or tests the trainee in comparison with the published objectives. These provide the benchmark by publicly stating what the trainee will be able to do, to what standard and under what conditions.

Effective objectives lie at the heart of measuring learning during the training event. They have been defined as:

Definition

A precise and concise statement of what the trainees will be able to do at the end of the training event.

Preparing Instructional Objectives, Robert F. Mager, Kogan Page Ltd, May 1990.

Objectives must be:

- Clearly written – that is open to only one interpretation by trainer, trainee and the trainee's manager.
- Specific – that is an exact statement of what the trainee's required to do.

They should cover three main areas of performance:

1. **Knowledge** – use such words as define, list, state, describe etc.
2. **Skill** – use such words as draw, construct, adjust, reassemble etc.
3. **Attitudes** – use such words as value, accept, appreciate, identify with etc.

The final set are the hardest of all to measure if they have been achieved successfully because they often try to identify an external display of an internal process.

What we have discussed so far relates to the trainees classroom performance (demonstrating they can or can't achieve the objective) but in order to ensure they can transfer this to the workplace performance needs to be complemented by two other elements.

Three parts of an objective

1. **Performance** – What is to be done?
2. **Conditions** – Where will it be done and what environment, equipment or materials will be used?
3. **Standards** – What level of achievement is required?

The standards can be measured in terms of distance, weight lifted, rate of production, speed, degree of excellence, wastage/error rate etc. Any criterion by which the accuracy of performance can be judged.

This precision is possible by ensuring objectives have three parts:

1. **A performance statement**
2. **A condition**
3. **A standard**

eg

Here is an example:

Performance	Conditions	Standards
Solder the connectors	of any electronic components in current use, onto a printer circuit board	whilst meeting all meeting all company quality standards as laid down in the Production Manual

A

Activity point

Read the following list of objectives – three are well expressed and three less so. Work through our list and identify which category each example falls in to. Then draft an alteration to make it more effective.

1. Identify the four main services offered by our organization by name.
2. Know the principles of the Highway Code.
3. Re-assemble a transistor radio correctly.
4. Be fully conversant with the stop and search powers of a Vehicle Inspector.
5. Recall where the heating fuel tanks are on the Business Park.
6. Draw a diagram of the approved exits to use in a fire drill.

We think that the most effectively worded are 1, 3 and 6. 2, 4 and 5 could be more effective.

For example:

2. How do we know that they 'know' these principles? We could ask them to list, define or correctly identify from a list containing several errors, such as this exercise.
4. They may be fully conversant or they may not. Again how can they demonstrate this knowledge to help you measure their success?
5. Recall is again too vague, where's our evidence? We could add 'with the aid of a diagram'.

Activity point

Think about a training session on your training events. Write an objective you can use to help measure how effective the trainee has been in absorbing the information.

For example, 'By the end of the ten minute instruction session the participant will be able to correctly load a new film, using the equipment provided and take a close up photograph of the trainer standing by the door. Manually selecting the optimum camera set-up as recommended in the Pentax Operating manual.'

In practical terms it can be difficult to isolate how much the trainee has gained. Unless a complete novice before the event most trainees will bring some level of experience and aptitude. Some objectives are difficult to measure and performance on the course does not guarantee the job holders ability to apply it to work. This particularly applies to the more complex area of interpersonal skills training.

Interpersonal skills take many diverse forms – persuading, arguing, questioning, listening, helping, training, and so on. Much of our daily life within work and outside it is concerned with one-to-one or group interactions and it is not surprising that many training activities focus on the development of appropriate skills in this area. Because human interaction is so complex and occurs on several simultaneous levels of behaviour it is quite unrealistic to aim to capture information about everything that is going on. The key thing is to decide what it is that you want to know about the learners' behaviour and then to design a checklist that is not too complicated.

Methods of improving the objectivity of behavioural observations

1. Determine the appropriate observational framework and the categories to be used – normally derived from the training objectives, and sometimes from a particular psychological theory of behaviour.
2. Train the observers until they are reliable on their own and have a high correlation with fellow observers recording the same interactions.

Examples of behavioural analysis

Here are some categories of behaviour that the trainer may wish to evaluate:

a) Group behaviour

With an analysis of group behaviour it is usually difficult to record everything that happens on video and these examples are all intended for use by a trained observer during the event itself.

1. Individual behaviour in task-structured groups (e.g. a group role play by trainees; a participative training session). Here observer checklists would be drawn from formal objectives.
2. Individual behaviour in unstructured groups (e.g. sensitivity training). In this case, observer checklists would be based upon a particular model of group behaviour.
3. Patterns of behaviour in groups:
   - Diagrams of who speaks to whom
   - Analysis of differential contribution rates
   - Conflict analysis (e.g. the Thomas-Kilmann model based on individual questionnaire responses interpreted in the light of observed group behaviour).

b) One-to-one behaviour

1. Inferred (or underlying) behaviour examined within the framework of a particular psychological theory, e.g. transactional analysis, where the observer might identify different ‘ego states’ and ‘matched’ or ‘crossed’ transactions between the parties.

2. Retrospective examination of observable behaviour, using a video recording of the event and checklists derived from the learning objectives.
3. Analysis of behaviour during an actual or role-played event, using observer checklists (e.g. appraisal interview; disciplinary interview; counselling contract; job instructions).

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Activity point

Have a look at our sample observer's checklist. Design an example based on the key interpersonal skills you want to see demonstrated by the trainees at one of your training events.

Sample observer's sheet

Interviewing skills	Number of occasions	Notable examples
1. Establish rapport • Greeting interviewee • Explaining procedure • Finding common ground		
2. Attentive listening • Eye contact • Posture • Encouragers • Head nodding • Distracting mannerisms		
3. Exploring and clarifying • Open questions • Reflecting • Paraphrasing • Summarizing • Probing • Hypothetical questions • Identifying options • Presenting facts and information		

Interviewing skills	Number of occasions	Notable examples
4. Barriers to communication • Closed questions • Leading questions • Multiple questions • Jumping to conclusions • Imposing solutions		
5. Pace and control • Speed of discussion • Ratio of talk/listening		
6. Disengagement • Clarifying job holder's position • Summarizing outcome of discussion		

LEVEL 3: Behaviour

This sets out to examine whether the trainees have applied their learning in the form of changed behaviour at work. It focuses on whether their results and performance have improved. Typical examples of this type are post-course interviews, comparison of performance appraisal reports and the trainer observing the participant on-the-job.

Evaluating job behaviour can provide a more considered form of feedback to the trainer on the learning methods and training strategy. It also helps establish the relevance of the learning objectives specified to the actual training need.

Whilst good results can certainly improve the credibility of training the trainee, they may not however, be disposed or given the opportunity to demonstrate them. The training may have been effective but due to a faulty specification have developed a range of skills that are of little practical use at work. Other factors may also intervene which can affect the transfer of learning to the workplace, e.g. internal re-organization or introduction of new services.

Post-course interviews

One the quickest and most cost-effective ways to evaluate the training is for the trainee's line manager to conduct a debriefing discussion with the job holder. This will help create the right environment for training to be put into practice and help the transfer of learning to the workplace.

Having established your interest by conducting a pre-course discussion this can reinforce the message that the manager and organization are not merely paying lip service and treating training as an isolated event.

What should the discussion cover? There are two distinct areas. The first is how the trainees intend to apply what they have learned to their work:

- Have their training needs been met?
- Did the course give them a new insight into their role?
- What skills and knowledge have they gained from the course?
- How is this new knowledge relevant to their job?
- How do they intend applying their learning at work?
- Have they drawn up an action plan on the course?
- What help do they need from their manager or anyone else, to put this plan into action?
- Which areas do they need further information or coaching on?
- Any follow-up programmes needed in the future?

The second is that this also provides an opportunity to review what they thought about the course now it is over. Typical areas to probe here would include:

- What did they think about the course overall?
- Did it live up to the promises in the brochure?
- Were the trainers knowledgeable and competent at delivering the material?
- Was the course pitched at the right level for them?
- What use was made of any pre-course material?
- Had they done enough preparation for the course, could their managers have helped more?
- Were there any weaknesses in the course? How could these be overcome?

- How appropriate were the training methods used?
- Was there enough variety to suit different styles?
- What efforts were made to relate the topics to their own working environment?
- Would they recommend this course for other members of staff? If so, who would benefit?
- Do they consider the event value for money?
- Are there any follow-up activities planned by the trainers?

We have already seen one example of a post-course form – the one earlier was to be completed immediately on return from the course. We would also like to suggest another review point. This form is to be completed by the course delegate and his or her manager at a review meeting between three and six months after the training event. (This often fits in well as part of the organizations performance management or annual appraisal/report.)

A

Activity point

Use our sample to design a follow-up report your line managers could use some time after the trainee's return.

Course follow-up review form

Please return a copy of this form to: ______________________

____

by:____

____

1. In general, how has the training contributed to your personal and/or professional development?

   ____

   ____

2. More specifically, how has your work practice changed as a result?

   ____

   ____

3. In what ways has the training benefited the work of the department as a whole?

4. In your view was the course worth it? Please give brief reasons for your response.

The training evaluation interview

The post-course debrief is just the first of a two-step approach that's required to ensure that the training has been worthwhile. The further interview should be conducted about six months after the trainee has returned to work as a link in the systematic approach to the training cycle. The discussion would have four main purposes:

1. *To re-appraise the identified training needs. Were these accurate in their assessment of what was required to improve the individual's performance?*
2. *To explore how successful the job holder has been in transferring what they learned to the workplace.*
3. *To review the effectiveness of a particular training event and the methods used. Time passing should help the participant make a more objective assessment.*
4. *To determine whether the training has had any impact on overall organizational goals.*

The interview schedule should be designed to collect only that information which cannot easily be collected by questionnaire. How best to structure the interview should be established by piloting the proposed schedule and questionnaires on a couple of the participants (or perhaps colleagues).

It is best to start the interview with open-ended questions. This starts the interviewee talking and reduces tension and it also gives him/her the opportunity to express opinions about effects that may be (to the interviewer) unexpected, i.e. start the evaluation interview in a goal-free mode.

All interviews have a beginning, middle and end. In the beginning they set the scene, build rapport and establish the purpose. Endings are concerned with summarizing what has gone on and reviewing the whole interview to make sure all the material has been covered. The heart of the interview is the main body. This is where all the main points are explored. As with all management activities, planning and preparation helps performance.

The training evaluation interview schedule

The schedule can help the training manager during the interview by reminding them of points they must explore. However, it should never be allowed to dictate the pattern of the interview. Interviewing must be a flexible process. You must always be ready to depart from the schedule with supplementary questions that clarify issues or which explore new themes that had not been anticipated when the schedule was drawn up.

Sample questions for the schedule:

- Why did you apply to go on the course?
- What did you hope to get out of it before you attended?
- Did it live up to your expectations?
- What do you think were the most useful things you learnt?
- What do you feel about the way the course was structured?
- If you were to recommend any changes what would they be?
- What do you think were the most useful things you learnt on the course?
- Can you give me examples of how you have changed your behaviour as a result of attending?
- Did you have a debrief from your manager on return?
- What benefit do you think that was?
- How much of your action plan have you carried out?
- What has helped or hindered you in this?
- Can you describe a specific incident in which you behaved differently because of what you learned?

- What evidence can you provide which demonstrates the impact of the course on the performance of your department?
- Would this improvement have occurred even if you hadn't attended the course?
- Are there any other parts of your job in which you think that some form of training would help you improve your performance?
- Would you now say that the course gave value for money?

A

Activity point

Using our example questions above, prepare a training evaluation interviewing schedule for use by your training department.

Reporting

The reporting of the data collected in evaluation interviews is usually done as a mixture of quantitative and qualitative information. Some content analysis is necessary in order to categorize the information for that purpose. For example:

Of the 57 managers interviewed, 43 did not conduct a debriefing session with the trainee when he/she returned from the course.

In the 14 cases where debriefing occurred, the benefits reported by trainees were as follows:

- Better understanding of the course content (6 cases)
- Creation of opportunities to practice new skills (9 cases)
- More open relationship with manager (4 cases)
- Opportunity to discuss career development (5 cases)

Quotations from the interviews can have great impact but should be used sparingly otherwise the report can appear anecdotal. The quotations should, of course, not be attributed to a particular individual; the evaluator must maintain confidentiality.

Training is expensive and it is important that we should make sure that we are getting the most out of it. The time, effort and cost of briefing, debriefing and evaluating is small when compared with the other costs of training. Taking these relatively straightforward tasks will help us to maximize our investment for both the organization and the individual trainee.

LEVEL 4: Results

This area examines the long-term impact of the training. The trainee may be able to demonstrate the new skill, but so what? It sets out to measure whether there has been any change in the efficiency and profitability of the trainees department and ultimately, the organization as a whole. It looks at changes in organizational performance and weighs these against the true cost of training.

As many a management guru has said a key tip is to 'start with the end in mind.'

A useful document is an evaluation quality assurance sheet. See our following sample:

Evaluation-quality assurance

Course title: ________________________________

Interviewing skills

Definition of the problem

- Line managers now have responsibility of promotion with no HR support.
- Line managers, although technically aware, are not aware of behavioural interviewing.
- Line managers interviewing by gut feeling only.

State course rationale

- Develop line managers interviewing skills.
- Develop line managers awareness/skill of behavioural interviewing.
- Developing line managers confidence to take on responsibility for promotion.

State benefit to the company

- Promote 'best' person for the job.
- Reduce probability of discrimination/error.
- Personal development, commitment to the recruitment process.
- Costs of severance if person 'unsuitable'.

What are the observable performance improvement indicators?

During the course:

- Objective tutor assessments.
- Role play exercise demonstrating skills learnt.
- Increase in score on employment law quiz.
- Candidate and observer feedback forms

Post course:

- Lower interviewee/position ratio.
- Reduced time wasted on interviews.
- Achievements of new promotees once in the position.
- Fewer (no) employment tribunal cases.
- Commitment from staff and managers to use the selection procedure.
- Reduction in manpower turnover.
- Increase in numbers of people applying for jobs.

What is the timescale of evaluation?

- 6-12 months after training

For these items it can again be difficult to isolate how much of the improvement can be directly attributed to the specific training event. There are whole ranges of other variables that can have an impact on organizational efficiency that are totally independent of training. Macro forces such as fluctuating currency rates, major changes in legislation, often affect organizations. Even war and natural disasters can have an impact on profitability that has nothing to do with training. In our example, an increase in employment tribunal cases may reflect a nationwide trend to become more litigious in ones' pursuit of employment remedies.

Donald Kirkpatrick, considered by some as the founding father of evaluation, did not offer a formal definition for this final element of his framework. He provided a range of examples to make clear his meaning.

"Reduction of costs; reduction of turnover and absenteeism; reduction of grievances; increase in quality and quantity or production; or improved morale which, it is hoped, will lead to some of the previously stated results."

It is worth noting that there is a shift of emphasis between the third and fourth levels in Kirkpatrick's framework. The first three elements centre on the trainees; their reactions, their learning, and changes in their behaviour. The fourth element however focuses on organizational payoffs and business results.

Training is expensive, so it's not surprising that people want to assess the return on investment (ROI) on it. But training is often inefficient when compared to other ways of improving performance, for example, recruiting better people, changing the structure of jobs, or simply setting challenging goals and demanding better results.

A report, prepared by the *American Society for Training and Development (ASTD)*, contains the results of a 1997 survey on the evaluation of training. The survey assessed the importance of measurement and evaluation to HRD executives and determined which evaluation methods are most popular.

Output	**Percent**
Customer satisfaction	69%
Job satisfaction	38%
Productivity	37%
Return on expectations	35%
Safety violations	28%
Sales	22%
Return on investment	20%
Turnover	20%
Cost/benefit ratio	18%
Waste reduction	15%
Grievances	12%
Profitability	9%
Absenteeism	8%
Overtime	6%

As you can see at the bottom end of the scale were overtime, absenteeism, and profitability, none of which were measured by more than 10 percent of organizations. Return on investment was measured by 20 percent of companies, primarily large organizations.

These results probably reflect the difficulty of linking training courses to most quantitative outcomes.

A

Activity point

Training managers must respond to the future challenges by implementing all these concepts and evaluating at multiple levels. We suggest that you focus on the following to demonstrate evaluation at the fourth level – results.

1. Customer satisfaction

The evaluation of customer satisfaction has the benefit of being multi-dimensional. First, the definition of training has expanded to include the trainee's unit manager, the unit, and the organization – not just the trainee in the classroom. Second, we are measuring perception of quality, convenience, and value. This information is crucial to continuous improvement in all organizations.

2. Impact on the business problem

This level is usually the most important to the line manager. It answers the question, "Did the training make a positive difference to the problem I have?" Work with the line manager to identify their business problem at the start of the training cycle and from that work out what needs to be taught. This level of evaluation also makes training managers think of training as one problem-solving intervention among many.

3. Return on investment

Training managers increasingly have no choice but to demonstrate the effects of their work on corporate profitability or meeting other key business performance indicators. This is true of every unit in the organization. Whereas it was once considered impossible to measure the ROI of training, many organizations are now doing so. The knowledge to achieve this goal is readily available to the practitioner, although the goal is still difficult, complex and dependent on a long-term perspective. Discussions with cost accounting experts are helpful. However, the goal is reachable, and once you begin to measure ROI your process will improve.

ROI calculations and scientific evaluation rarely take into account different stakeholders' views about the value to them of any particular training. Evaluation designed to reinforce training actively seeks out different stakeholders' views, so that the interpretation of training results can be understood and the 'why' and 'how' of training impact can be fed back to all involved and used in ways to extend, even embed, the effect of the training.

Calculating ROI

Jack J. Phillips is well-known in the area of ROI evaluations. He describes a basic formula for calculating ROI. (See Phillips, J.J. (1996). *Was it the training?*, Training and Development, March, 1996.)

Step	Process
1	Collect level-4 evaluation data by asking, "Is there a change in job performance that is positive and measurable?"
2	Isolate the effects of the training from other factors that may have contributed to the results.
3	Convert the results to monetary benefits.
4	Total the cost of training.
5	Compare the monetary benefits with the costs. The non-monetary benefits can be presented as additional, though intangible, evidence of the program's success.

Step 3 is probably the most difficult part of the evaluation framework as it is very subjective and based on the opinions of stakeholders.

The problems in assessing ROI are more challenging in public and non-profit-making organizations – government departments, charities, voluntary bodies, etc. ROI assessment in these environments can be so difficult as to be insurmountable, so that the organization remains satisfied with general approximations or vague comparisons, or accepts wider forms of justification for the training without invoking detailed costing.

Return on investment tells you the percentage return you have made over a specified period as a result of investing in a training programme. On the assumption that benefits will continue to accrue some time after the training, then the period that you specify is critical to the ROI figure you will obtain. You may like to specify a period that fits in with your organization's planning cycle – perhaps a year or two years. On the other hand, you may wish to calculate the period to correspond to the lifetime of the benefit, in which case you will need to know how long the average student stays in a position in which they can continue to apply the knowledge and skills being taught.

It is relatively simple to calculate return on investment:

% ROI = (benefits/costs) x 100

Payback period

Another way at looking at ROI, is to calculate how many months it will take before the benefits of the training match the costs and the training pays for itself. This is called the payback period:

payback period = costs/monthly benefits

Payback period is a powerful measure. If the figure is relatively low – perhaps only a few months – then management will be that much more encouraged to make the training investment. As a measure, it also has the advantage of not requiring an arbitrary benefit period to be specified.

Bibliography

There are a number of books that have been written on evaluation. I would particularly recommend the following:

- *Evaluating Training Programmes*, Donald Kirkpatrick, Berrett-Koehler, 1994.
- *Evaluating Management Development*, Mark Easterby-Smith, Gower, 1993.
- *Training Evaluation Handbook*, Tony Newby, Gower, 1992.
- *Evaluating Training Effectiveness*, Peter Bramley, McGraw-Hill, 1991.
- *Using Evaluation in Training and Development*, Rae, L., Kogan Page, 1999.

Checklist

Have you:

- ✓ Established with the trainee why they are going on the training course?
- ✓ Reviewed the pre-course material to make sure you have identified all the information they require?
- ✓ Set up a pre-course discussion between the trainee and their line manager?
- ✓ Devised and tested any course reaction sheets?
- ✓ Ensured that every course has written objectives clearly stating what the trainee should do, under what conditions and to what standards by the end of the event?
- ✓ Identified suitable rating forms to help record observations of changes in trainees behaviours?
- ✓ Set up a post course discussion between the trainee and their line manager to help the transfer of learning to the workplace?
- ✓ Arranged to carry out a training evaluation interview six months after the trainee has returned to work?
- ✓ Structured that interview to give you consistent and reliable information from the variety of trainees?
- ✓ Written an evaluation-quality assurance sheet for every training event?
- ✓ Made sure that it specifies the measures you are going to use to judge the longer term benefits to the organization?
- ✓ Kept up to date with the key performance indicators you can use to demonstrate the effectiveness of the training?

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Chapter eighteen

Continuous professional development

Introduction

By the end of this chapter you be able to:

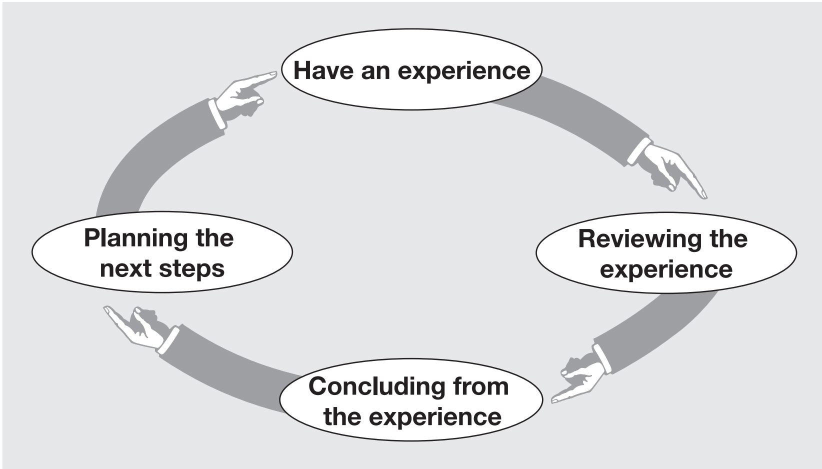
- Identify the competencies needed to be an effective trainer and developer
- State why it is important that you are seen to be actively developing yourself
- Rate your strengths and weakness in each core competency area
- Write an action plan for your own continued professional development.

Having reached the end of this Guide you may be feeling a little holier than thou. We have referred several times throughout the Guide that personal development is a continuous, life-long process. We also believe that this should be particularly true of training managers, trainers and developers themselves.

What are the benefits of continued development for developers?

- We provide a role model of how to do it.
- It enhances credibility; we can't be accused of not practising what we preach.
- It avoids complacency; it's quite easy to slip from unconsciously competent back to unconsciously incompetent.
- It reminds us what it's like to be a learner; stops us from taking the risks and feelings for granted.
- It provides us with new 'real' material we can use on our own training events.
- It gives us new/different role models we can emulate.
- It enables us to become more effective at doing our job.
- Success breeds success. Continued professional development can groom us to take more steps up the ladder, either in our specialist area or moving into more general management roles.

What is involved?



The learning cycle

Developing yourself as a developer involves the same core steps as developing your staff, trainees or customers, we all need to go around the learning cycle.

The planning process

Our planning process involves three stages:

1. Where am I now?

   This involves making an analysis of the current state of your skills, knowledge and management style.

2. Where do I want to be?

   Identify your key areas for personal development?

3. How do I get there?

   What action do you need to take to bridge the gap and set yourself up to reach your goals?

Where am I now?

Personal stocktaking

Having had some experience of developing others, and hopefully having worked through and applied many of the chapters in this book, you should be ready to take the next step; reviewing your experience as a trainer and developer. The purpose of doing this is to be able to evaluate your current level of skills in the competences required to be even more effective.

There are a number of ways of doing this:

- You could buy a list of competencies published by CIPD, MCI or similar organizations.
- You could lead a brainstorm session with your colleagues to identify a range of competencies needed to be an effective developer.
- You can use our suggestions as a starting point against which to analyze yourself.

Competencies required by trainers and developers

1. Creating a learning climate on my events.
2. Putting training into the context of my work.
3. Selling the benefits and handling objections to training.
4. Keeping the whole of the training and development process in mind.
5. Establishing training needs.
6. Recognizing developmental opportunities.
7. Following a structure when developing training .
8. Using communication skills to manage discussions.
9. Setting meaningful training objectives.
10. Choosing training opportunities that complement the trainees preferred learning style.
11. Being focused when preparing my learning material.
12. Deliver an effective training presentation.
13. Train staff on-the-job at their workplace.
14. Pose and handle questions to maximize learning.
15. Facilitate a discussion.
16. Both give and receive feedback constructively.

17. Help my staff cope with personal problems.
18. Promote a learning climate in my organization.
19. Plan and evaluate the effectiveness of training.
20. Commitment to continuous development.
21. Other items I have identified while working through activities in this book (please specify):

Your first task is to sit down and review the items listed. Consider each in depth. You may want to clarify what's involved in that competency if you haven't reviewed it for some time.

When you are satisfied that you have a good understanding of each of these items your next task is to rate them as either:

A Very important to my current job

B Some importance

C Little or no importance.

You then rate how effectively you think you can perform in that area using a 5-point rating system:

5= Excellent

4= Significant strength

3= Satisfactory

2= Many areas of weakness that need improvement

1= Poor, considerable need for improvement

A

Activity point

We suggest you spend 15-30 minutes working on your own review and rating your current level of competence.

Take a reality check

Robbie Burns quote

"O wad some Pow'r the giftie gie us
To see ourselves as others see us!
It wad frae mony a blunder free us,
And foolish notion.

Robbie Burns, *To a Louse,* 1786.

Having completed your personal audit the next step is to clarify your current position with a small group of peers.

To help you will need to work with a small group of three or four members. Don't just choose your best friends (or your worst enemies). Go for a blend of people who know your performance at work and whose judgment you trust.

Explain what is happening and encourage them to take part by using this opportunity to receive some feedback for themselves using the following format.

Disclosure

During the activity each member of the group takes it in turn to sit in the 'hot seat'. They should spend 15-20 minutes discussing their ratings with the other members.

At the end of that time the group members should respond by either:

- **Clarifying:** asking questions which enable both you and them to explore your reasoning and judgement.
- **Reacting:** providing constructive feedback for you to consider during which they:
  - Point out aspects of performance you may have overlooked, both strengths and weakness.
  - Challenge where your self-assessment seems to be wrong or contradictory.
  - Affirm their support for your ratings, giving their evidence for doing so.
- **Prioritizing:** work together with you to identify an order of priority for your development needs.

We suggest you ask for specific feedback, for example:

Three things they'd like you to stop doing:

1 ______________________________

2 ______________________________

3 ______________________________

Three things they'd like you to continue doing:

1 ______________________________

2 ______________________________

3 ______________________________

Three things they'd like you to start doing:

1 ______________________________

2 ______________________________

3 ______________________________

This process continues until all the participants have had the opportunity to review and prioritize their development needs.

Closing the gap

When you have all finished it is time to move on to the next stage. There is a wide range of developmental activities that individuals can take advantage of. We have provided two templates for your consideration. You can use them independently or combined together.

1. Prompts

P	PEOPLE	Who might help?
R	RESOURCE CENTRES	Where might help be available?
O	ORGANIZATIONS	What relevant organizations exist?
M	MODELS	What have others done in similar circumstances?
P	PROGRAMMES	Are there ready-made courses available?
T	THINGS	What book, tapes, equipment might help?

2. Learning and development opportunities – 21 work based activities for developing your skills

21 work-based activities for developing your staff:

1 **Coaching:** Have the job holder act as a coach to one of their staff or colleagues.

2 **Delegation:** Remember this involves delegating a real part of your job, not merely allocating a task.

3 **Project work:** Particularly relevant when the individual needs to develop a skill not part of their current job.

4 **Job exchanges:** Can be organized informally within your section to cover for sickness, leave etc.

5 **Secondments:** A more structured version of job exchanges, usually for longer periods, often involving other departments or outside organizations.

6 **Deputizing:** Good practice for individuals in line for promotion or wanting to gain management skills.

7 **Shadowing:** Accompanying and observing a manager or other team member.

8 **Training delivery:** Planning and running an in-house training event. Either to reinforce or learn a new subject.

9 **Mentoring or buddy schemes:** Gain experience, knowledge and feedback from others either up or down the line.

10 **Committee membership:** A standing committee or special event. Gives an insight into procedures and politics.

11 **Hot-line:** Manning a telephone response service, giving advice on unusual or difficult situations.

12 **Writing reports:** Involves preliminary research into a topic. Opportunity to develop analytical and communication skills.

13 **Making presentations:** A useful follow-up to report writing. Develops communication skills.

14 **External representation:** Acting as an ambassador for the organization at an external event. Could also involve making a presentation.

15 **Product champion:** The sections representative who will learn and be responsible for implementing a new product or procedure to your department.

16 **National forums:** Representing the organization on a national body.

17 **Professional representative:** Representing your specialism on internal or professional bodies.

18 **Trade Union Representative:** Acting for other members on local or national meetings.

19 **Study visits:** Learning and reporting back about best practice in other organizations.

20 **Trade exhibitions:** Regional, national, specialist. Opportunity to update on new products or services.

21 **Vocational qualification:** A work-related professional course combining qualification with work-based projects.

Plan your action

Your next step is to identify which of the ideas generated you want to pursue. Take time to draw up a short-list. We suggest that between three and six action points will give you enough scope without overwhelming your day-to-day tasks.

When you have worked out what you need to focus on, your next step is to work out a development plan that shows what you propose to do to meet your development objectives.

Action planning checklist

1 **What am I going to do?**
Which of my priority needs am I going to develop?

2. **What steps am I going to take?**
What activities will help me meet my needs?

3. **How am I going to start?**
Work out a clear first step for each activity.

4. **When am I going to start?**
Commit yourself to a specific, realistic start date.

5. **How will I achieve it?**
What methods will I use, what resources will I need?

6. **Who else will be affected?**
Who do you need to support you, how and when will you approach them?

7. **What could prevent me?**
Who or what might put obstacles in your way? How will you overcome them?

8. **How will I know when I've succeeded?**
How and when will you monitor your success?

Work through the questions and apply them to each of the activities you have chosen.

When you have finished identifying the steps you want to take, work with a partner of your choice from the group. Discuss your action points with your partner and get some feedback on your proposals.

When you are reviewing your development plans check to make sure that they comply with our **SMARTER** formula for success.

S – Specific

They are not vague or woolly but say exactly what you want to achieve. Narrow it down to the most detailed level you can.

M – Measurable

How will you know when you've succeeded? Find some way to measure what change has taken place. Unless you can monitor progress how will you know you've been successful?

A – Achievable

Be realistic, but aim to stretch yourself. Too low and you won't have a challenge. Too high can bring demotivation and disappointment.

R – Relevant

It is essential that your goals are personally meaningful. Doing it for yourself will make you feel proud and satisfied when you achieve.

T – Timed

Set realistic time targets. Can you identify by when you would like to have achieved your goals?

E – Exciting

This should ensure that it would stimulate you into action. If it doesn't, you may opt for the status quo.

R – Recorded

Writing your goals down serves to form a contract with yourself. Written goals can be reviewed and modified. You can carry them around as a permanent reminder or to show to others.

When you are satisfied that you have well-formed written goals whose achievement are going to contribute to your continued professional development, all you need to do now is to tackle that important first step that will lead to ultimate success.

Best of luck.

Well done.

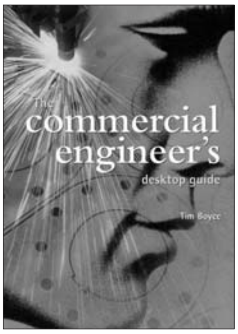
Eddie Davies

Checklist

Have you:

- ✓ Reminded yourself of the benefits of continued development?
- ✓ Undertaken some personal stocktaking by reviewing your current level of performance against the competencies required by trainers and developers?
- ✓ Sought feedback from others on your level of competence in these areas?
- ✓ Identified from a range of learning and development opportunities, which you will use to develop your skills?
- ✓ Written a personal development action plan that incorporates SMARTER learning objectives?
- ✓ Identified a clear first step?
- ✓ Taken that step?
- ✓ Continuously reviewed your actions against your planned development?

Other titles from Thorogood



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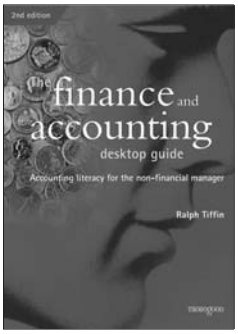

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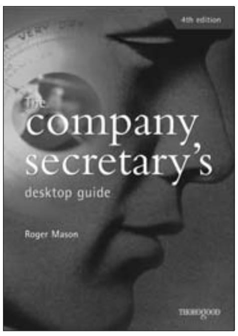

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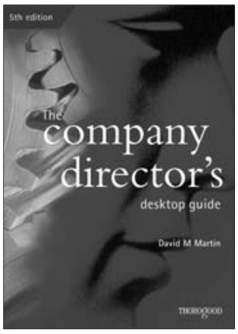

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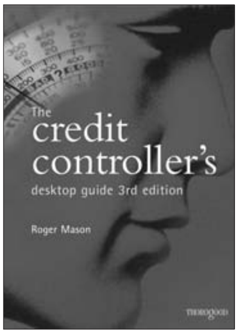

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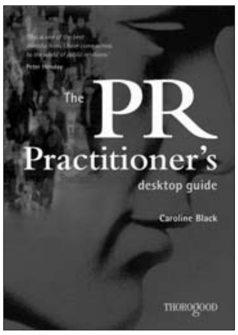

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All our trainers have a practical commercial background and highly refined people skills. During the course of the programme they act as facilitator, trainer and mentor, adapting their style to ensure that each individual benefits equally from their knowledge to develop new skills.

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