

Driving Performance Through Training

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Tough times demand tough action. You have a mountain of training and reference material, but does this mountain of material address your current business goals? For example, your training department has been in existence for a number of years, and you have a great deal of content. Individual departments have constructed manuals and cheat sheets to support performance on the job. There have been corporate initiatives supported by training and job aids, and you have all that content. You have the training development you have contracted out to support your employees' need for career development. You have the courses your own training department has developed. Various divisions and departments may have constructed training to support divisional goals. You purchase off-the-shelf content that you make available to your employees. You have a mountain of material, all of it created by different groups with different goals, and no measurable results. An audit of your current materials may yield a goldmine of business results for your company.

Let Business Goals Drive Your Decisions

When an organization is looking for places to cut costs, training programs and maintenance of learning assets are often some of the first things to get cut. The reason for this is that there is no perceivable link between the training programs and business goals. Re-tooling these programs can drive productivity and performance improvement in your organization, but that means that all training in the organization must be designed to drive the achievement of a business goal.

The goal of good training programs isn't to get butts in the seats, but to get results. The first step is to know what your organization's goals are. Management is probably well aware of these goals. They might even have published them for the employee population. If not, write them down. Is it a key business goal to increase sales? Increase market share? Improve warranty compliance for dealers? Sell more service agreements? Sell more parts? Improve close rates with an existing telemarketing staff? Improve call resolution rates with an existing tech-support staff?

After your business goals are documented, the next step is to understand how these goals are tracked and measured, and to understand who owns each metric. It is important to work with these internal owners (whether they're individuals or departments) to build training programs and performance support interventions that are right for them. Make an effort to understand their pain and what it will take to correct or improve the situation. Only then will you be able to properly craft a training program or performance support intervention that can help make an improvement.

For example, a heavy equipment manufacturer we worked with developed a warranty scorecard for its dealers. This scorecard included a list of areas in which they felt they would like to improve. One of the items the scorecard measured was the percentage of parts returned that were not defective or damaged. This pointed to a lack of diagnostic skills on the part of the mechanics at some dealers. The client created a training program and reference materials for mechanics to troubleshoot and properly diagnose the problems. Once the training program was launched and the reference material made available to dealers, this metric began to improve. This training must be constantly adjusted as new equipment and parts are released. This scorecard identifies the ever-shifting and changing needs of the audience and the true business goal of this particular training program.

Inventory Your Learning Assets

Now the fun starts. Inventory your training programs and performance support interventions. Create a big list. Include all the courses from your course catalog. Include the little classes taught within individual departments. Include the key cheat sheets and job aids in use out on the floor. Include the orientation manuals and other references you have that serve as training. The remainder of this article will lump training programs and other performance interventions into one big pot called "learning assets."

Along with each learning asset, document as much of the following information as you can:

- Name.
- Type (instructor-led training class, Web-based class, job aid, reference manual, etc.).
- Last update.
- Owner (individual or department).
- Comments.

Be sure that you don't limit yourself by only thinking inside the training-department box. Reach out to other departments that may hold assets you can leverage. Likely candidates are human resources, customer service or customer care, engineering and sales, to name a few. You may think of others that are specific to your organization.

Finders, Keepers, Losers, Sleepers

At this point you have two very valuable items: a list of key business goals and an inventory of your learning assets. Separately, these documents are useful, but when you combine them they become very powerful indeed. Go through the learning assets one by one and sort them into the following categories based on the business goals, not on your emotional attachment to a particular asset:

- Finders include learning assets that your company needs but does not have. As you perform your assessment, you may find you have ideas about new learning assets that could be used to support a business goal. Make a list of these, the problem they address and the business metric that would be used to measure success. Notice that they're called "finders," not "build these ourselves." Training departments (and internal divisions and departments) often waste time and resources building learning assets that could easily be acquired off-the-shelf and tweaked for use in the company.
- Keepers include learning assets that clearly support business goals and meet all the requirements for a well-founded training program or performance support intervention. If most of your learning assets fall into this category, you are ahead of the curve.
- Losers include learning assets that do not directly support any business goal identified by your company. The maintenance of these assets cannot be justified, and you should consider cutting them. Keeping these assets will only perpetuate the notion that training is a waste of time.
- Sleepers include learning assets that could be of value, but need re-tooling, better metrics or perhaps a new format to be full-fledged keepers. Your goal should be to turn the sleepers into keepers. Perhaps you offer a half-day training class in a particular topic, when in fact a well-constructed quick reference card will fill the bill. Dump the class and circulate the quick reference card if that's what it takes to support the business goals.

How to Sort

Need a little more direction on how to sort items into the categories? The following is a list of questions you might ask about each learning asset to help you categorize it properly. Use these questions to sort the keepers and the sleepers from the losers.

- Is this learning asset mission-critical for the organization? Is the health of the public or employees at risk, or is corporate liability at risk? For example, developing a training program to ensure that all manufacturing staff follow proper electrical bonding procedures during the assembly process could be a critical component in ensuring that your product meets safety standards.
- Is the training program designed to support the company in the achievement of one of its stated goals? For example, if reject rates are a problem and improper electrical bonding is identified as an issue, then developing an electrical bonding course not only helps you meet safety standards, but performing the procedure correctly in the first place improves reject rates and therefore improves productivity.
- Does the training program include the means to measure performance improvement? This is not just test results, but on-the-job, measurable results. You should ensure that each training program is designed to improve job performance and that the information to support this is or can be available. For example, are you tracking reject rates now? Are you also tracking the specific problem that caused the item to be rejected? The training program should not only include pass/fail criteria, but should also state the desired improvement that should be seen on the job and identify the statistic that will be used to measure it.
- Do you have a baseline performance metric that can compare pre- and post- training results? These are important for justifying the training program and tuning the program on an ongoing basis. Just before you launch the training program, be sure to take a snapshot of the statistics so you will have a baseline. If you have not been doing this as a routine part of developing and launching training programs, you must start doing this immediately.
- Does your training program work in concert with other initiatives the company considers important? If the training program is part of a larger initiative that the company has launched to improve performance, roll out a new product or increase sales, the training program should be designed at the same time and support the same objectives. It should also use the same measures as the rest of the program to measure success and make a meaningful contribution to achieving that success. Since your training programs support the success of the company, they should almost always be part of a larger company initiative. If they are not, reconsider the relevance to the organization.

- Does your training program use employee time respectfully? Is the time spent on the learning worth the results? Don't over-train. Does the target audience need to understand all the science behind how the electrical bonding process works? The history of the electrical bonding process and the life story of the inventor of the tools used in this process and the discovery of electricity? Or do they just need to understand the procedures, with perhaps some additional information, for example, about why using a certain type of water is important to eliminate the temptation to use tap water. Use the "just in time, just enough" philosophy when reviewing these programs. Is a three-day class on electrical bonding required, or is a one-hour demonstration going to do the trick?

What to Do With Your Sorted List

After you have sorted your courses into finders, keepers, losers and sleepers, decide what you need to do to turn the sleepers into keepers. Then get the information you need to develop training programs or other performance support interventions for the finders. Put a case together for dropping the losers. This may help you find the funding to develop the new offerings needed in the finders category. Obviously, you can keep the keepers.

Next, put all the training programs that are finders and sleepers into priority order. To do that, you should list them in critical goal order. For example, if your company has a serious customer service problem and company leadership has been working hard to correct this, then training programs that are designed to improve customer service go to the top of the list. Talk to the owner of the customer service organization and make sure you understand how customer service and customer satisfaction are measured and what initiatives are currently in place. Develop a training program that supports and complements these initiatives. The learning objectives should tie to the business or operational goal in a direct way. You and the owner of the customer service organization should agree to what the success looks like and how it is measured.

Develop estimates for cost, timelines and resources required for each training program or performance support intervention. Compare that to the return on investment the company should realize if the training program were successful. Is the improvement worth the development cost? If not, the approach you've selected may be overkill. (Remember, the key to success is "just in time, just enough.") If you still think doing something is worthwhile, develop a simpler approach that will meet the requirement with less effort.

Building Keepers

Building successful training programs and performance support interventions isn't difficult. Half the battle is getting into the habit of measuring the results of the training in terms of business goals and performance improvement rather than hours of training or students processed. Here are some guidelines for developing keepers:

- **Just in Time:** Train when the training means something. Don't train your technical support staff on your new product three months before the product release. They won't remember what they've learned.
- **Just Enough:** The history of the electrical bonding process and the discovery of electricity are not needed to ensure that proper procedures are performed. Just because something is interesting or related does not mean it is relevant to the learner or directly supports the business goal.
- **Just Right:** Train on what is relevant for the audience. The guys on the loading dock do not want the same set of information about your product that the engineers want. The guys on the dock need to know how to pick it, pack it and ship it. They may need to know how to do a quality inspection and may also need safe handling information. That's what they should get. And your technical support team is going to need a completely different set of information. Target your audience.
- **Use What You Have:** If your organization has information, tools and reference material available, you should consider using these as part of your training approach. Remember, the goal isn't to get the butts in the seats or to have the thickest binder, but to improve performance. If reviewing the tools and showing the learners where to get information when they need it supports the goals, then that is the approach you should take. Consider a blended approach that includes a mix of components, such as classroom training, certification tracks, self-study materials, online discussion groups, Web-based training, off-the-shelf third-party courseware and existing reference material. Creatively use the components you have and augment them as necessary.
- **Measure:** Identify the metrics you will use. Take a baseline before you launch the training program, and take another snapshot of the metrics after the training. Analyze the results and adjust appropriately.
- **Refine and Tune:** Use the results of smile-sheet evaluations, post-tests, certification exams and the performance improvement metrics to continually refine your offerings. If you skip this step, the training programs become tired and old. Neglect can turn your keepers into sleepers or worse yet, into losers. Be vigilant.

Conclusion

In order to be a valued asset to your company, the training function must support the company's success. The best way to do this is to make the achievement of business objectives your primary goal. This will mean letting go of some traditional notions of what makes for effective learning, including the notion that training is always the answer. Use non-traditional approaches to learning. Be willing to scale the training or learning program appropriately to meet the needs of the company and get the desired result without indulging in overkill. Think outside the box and reach out to those in other departments whose success you support. If you do all of this, you should be able to turn all of your learning assets into keepers and keep them that way!

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December 2003 Table of Contents