

Fail-Safe Pilot Programs

By Marjorie Garfunkel Derven

It can take months to set up a pilot for a new training program, so you want it to be right. This article tells the novice which bases to cover to be successful the first time.

You have carefully identified a training need, a skill area that is important to your company's success. The program—either developed internally or with the help of a consultant—is ready for delivery. How do you ensure that it will be a success?

A well-planned pilot program can help make the months of analysis, interviews, and program development pay off. Taking the following steps before, during, and after the pilot can turn the odds in your favor, and help you analyze the strengths and weaknesses of your program.

Before the pilot

Choose Your Audience

Participants in the pilot must reflect the target group for which the program is designed. Otherwise, you will not have an accurate picture of the effectiveness of the program content.

Various "stakeholders" in a pilot program may want to be in the pilot group to ensure that their goals are being met. For example, product managers may want to participate as "observers" in a sales-training program so that they can examine the product-knowledge part of the training. You should avoid having them observe the pilot, for several reasons:

- The presence of observers reminds everyone that the training is in pilot form. That encourages participants to evaluate the session rather than get involved in it.

- Observers can upset group dynamics.

Make trainees feel that their participation in the pilot is a form of positive recognition

- Observers may judge participants based on observations during the training. Training should provide practice—a safe environment where participants can try out new behavior and make mistakes. It should not be used to assess employees.

Instead of allowing stakeholders to observe the program, offer them ways to participate that will not interfere with the pilot:

- Give them a private walk-through of program materials.

- Provide copies of program materials.

- Include their concerns as part of the final evaluation process.

- Guarantee seats in future programs, after the pilot is off the ground.

Prepare Your Participants

Learner attitude is an important variable in training, especially in a pilot. To increase the likelihood that your participants will be receptive to the training:

- Tell them how the training was designed to meet their needs.

- Involve them in advance, with work that relates to the program and addresses an area that they care about.

For example, have salespeople in a sales-training course get feedback from their customers and managers before the course. Or have trainees identify in advance a problem or opportunity they would like to receive help with in the course.

- Have the instructor call each participant a week or two before the course to form a personal bond and address any questions or concerns.

- Make trainees feel that their participation in the pilot is a form of positive recognition. For example, you could tell them, "You've been chosen for the pilot because your opinion is respected in your branch." Even if a person has been selected for remedial training, you can present it in a positive way, for instance, "The training has been designed to develop new safety methods. We are interested in your input."

During the pilot

Establish Ground Rules

Determine in advance the ground 63

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rules for comments and feedback during the pilot. One option is to save comments and changes until the end of the program. Another approach is to allow comments throughout the session, so participants can pinpoint areas that are not working. A formal "debriefing" at the end of each day or major segment combines the best of both. It gives instructors and program designers critical, timely feedback, and allows necessary modifications to be made as the program unfolds.

Whichever option you choose, be sure to provide a structure that clearly differentiates between participants' roles as learners and as evaluators.

Once you have determined your ground rules, announce them at the beginning of the session, and get commitment to them. Ground rules for pilot participants could include

- Participate; you are responsible for your own learning.
- Your role is to be a participant, not an evaluator. On the other hand, this is a pilot; we will ask for your comments and insights at certain times during the training.
- Some parts of this program will be more valuable to you than others. Consider the training as an opportunity to add to your repertoire of skills. We would like a commitment that you will try the new ideas before you decide whether they will work.

Develop Group Cohesiveness

Group cohesiveness, always key, is especially important in a pilot. If the group does not work well together, it will certainly have an impact on the final evaluation of the program.

How can you ensure a good learning climate? Established techniques for other training sessions also apply in pilot programs, but you may want to spend more time than usual on breaking the ice and making the group feel comfortable. As soon as possible after group introductions, get participants working on an active learning exercise that is controversial, fun, or thought-provoking, so that they are involved with the learning material and each other.

Assigned seating is also a good way to control how the group interacts. Certain factors may affect seating arrangements:

- **Confidentiality.** Seat individuals from the same branch or department apart, when appropriate, if you will be

discussing sensitive issues.

- **Common experiences.** If an exercise demands a common background, seat participants based on shared knowledge.

- **Synergy.** Sometimes a goal of an exercise is to help individuals break out of old patterns. If that is an objective, look for diversity in seating arrangements.

- **Personal history.** Separate any trainees who have a known history of strong dislike or affection. Negative feelings can be a barrier to learning, and a temptation to focus on one another can pull trainees' attention away from the course.

In most cases, you should not conclude that "all is lost" and abandon your program design. On the other hand, there may be times when the problems in a pilot are fundamental

If you don't know the participants well enough to make informed decisions about seating, you'll probably find that getting such information from line managers is well worth the time.

Watch for Warning Signs

Clues that something is not working may surface during a pilot. Watch participants for such warning signs as

- little or no response to questions;
- lack of involvement in group exercises;
- excessively long breaks and lunch hours;
- negative body language;
- avoidance of the instructor during breaks.

The appearance of such clues does not mean that the program is a failure; the key is in dealing with the signals you get from the training group. First, analyze the probable causes. For example, if trainees are not responding to questions, it may be that questions are being asked in a confusing way, or that they sound rhetorical. Perhaps the group does not know the answer or believes that being wrong carries too high a risk. If trainees are not participating in a group exercise, it may be that the task has not been clearly ex-

plained, or that they do not perceive the value of the exercise. Your analysis will determine the appropriate course of action.

In most cases, you should not conclude that "all is lost" and abandon your program design. On the other hand, there may be times when the problems in a pilot are fundamental; it takes courage for an instructor to open up the session to discuss the problems. Reserve that course of action for cases when it is really justified. It changes the ground rules and may prohibit an accurate test of the remaining program materials, which might be on target.

After the pilot

The first step after the pilot is complete is to carefully analyze the results—the successes, as well as the areas that did not work as well as you had hoped. In their evaluations, participants should comment on the following elements:

- instructor competence;
- program content;
- level or complexity;
- timing and pace;
- customization.

Also ask participants whether they would recommend the program to others, and what, if anything, they intend to do differently on the job as a result of attending the program. It is a good idea to follow up again with participants two or three weeks after the course. Perspectives and insights may have changed by then. Face-to-face interviews that use open-ended questions often yield insightful data.

Once you have analyzed the results, it is time to communicate, communicate, communicate! If the pilot has been a success, let your clients know. If the pilot did not work, a detailed analysis of what went wrong, and the steps you plan to take next, will do a great deal to prevent the entire project from grinding to a halt.

It is also important to communicate the results to participants. They ultimately will be your most effective marketers. Let them know that you have listened to their comments.

A pilot program represents months of hard work. Just having appropriate program content is not enough. By paying attention to the needs of your stakeholders and managing certain elements before, during, and after the pilot, you can increase the probability of success.