Training 101

Marketing 101

You've got a brilliant idea for a new training program. What do you do?

■ A) Jot down your thoughts and leap into your supervisor's office, shouting "Eureka!" as you triumphantly wave your legal pad.

■ B) Prepare, prepare, prepare.

If you chose *A*, you might want to consider a career in the theatre.

The better answer, of course, is *B*. Careful preparation is crucial in the early stages of planning a program. Before you go near your boss with that legal pad, think of yourself as a salesperson. Your product is an idea, a training proposal. Your target audience is your boss—and yourself. As simplistic as it seems, you have to sell the idea to yourself before you can decide to make the sales pitch to supervisors.

To help with your marketing strategy, we've provided a checklist of points you'll need to consider, and a list of basic justification factors to help convince yourself and your boss that your product—the training program—is ready for the marketplace. We conclude with some practical tips for closing the sale with management.

■ A Checklist for Training Programs

By Gus Baker, a professor of industrial education at Texas A&M University, College of Education, College Station, TX 77843-3256; Dan Householder, who directs the Center for Career Development at Texas A&M; and Diane Fillo McArthur, who works in public relations and training with the Royal Bank in Toronto, Ontario.

Who can think of everything? Planning, justifying, and initiating a training program can be a complex process—nobody can remember all the factors that need to be considered. A checklist that focuses on relevant variables can provide critical information before expensive decisions are made—and help prevent the "oops!" syndrome.

Use the following checklist to help determine whether to recommend a training project to management. The information it includes can help convince managers to pay for and implement your idea. Once the program is operating, frequently update and review the checklist for ways to improve the training.

You will probably want to consider the points in the checklist approximately in order, as they are listed, but the sequence of questions and answers is not the critical factor. It is more important to carefully consider all aspects of the decision-making process to make sure you don't overlook crucial areas. Of course, in our less-than-ideal world, we cannot expect to answer all questions with an unqualified "yes" before we make a positive decision. The checklist is not a substitute for experience and judgment. It is an aid to attaining consistency and cost efficiency, and a safeguard against the kinds of embarrassing situations that can occur when a vital step is overlooked. Feel free to customize this checklist to your own setting and programs.

1. Is there really a training problem?

■ Are people actually able to do the task or solve the problem, but fail to do it successfully for other reasons?

■ Do people know what needs to be done and how to do it but fail to act on that knowledge because of attitude problems?

■ Do people lack motivation?

■ Do they have adequate supervision?

■ Is the task beyond the capability of the people who have been selected to perform it?

2. Does management support the proposed training effort?

■ Does management support the decision to attack the problem through training?

■ Will management provide active, visible support during training?

■ Will management reinforce the training after it is completed?

3. Has consensus been reached among everyone involved in and affected by the program?

■ Have all of the appropriate people had complete opportunity to take part in designing the training?

■ Does everyone involved agree that the training approach is satisfactory?

■ Does everyone involved agree that the training procedures are appropriate?

4. Has an adequate needs assessment been completed?

■ Have apparent discrepancies in performance been validated by the findings of the needs assessment?

■ Have you clearly specified the needs that the training will address?

5. Has a thorough job or procedure analysis been completed?

■ Have all the tasks or steps been identified?

■ Have related skill and knowledge items been grouped?

■ Are the clusters manageable in the training setting?

■ Does the analysis focus on essential knowledge and skills?

6. Will the training be cost-effective?

■ Will the training program enhance existing return on investment?

■ Will the training program contribute to improved worker morale?

7. Have clear goals been set for the training program?

■ Are the goals measurable?

■ Are they realistic?

■ Has an adequate, appropriate evaluation process been designed and developed so that it can be implemented quickly?

8. Is the program related to other programs?

■ Can past programs be used with minor modifications?

■ Is the proposed training related to current programs?

■ Will trainees need to have prerequisites before they can take part in the program?

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■ Will the program provide a foundation for future programs in the area?

9. Are the resources available to conduct the training?
■ Are competent trainers available who can convey the subject knowledge and skills?
■ Is necessary equipment readily available?
■ Will appropriate facilities be accessible?
■ Is the cost of the proposed training within budget?
■ Should the in-house staff conduct the training?
■ Would an off-the-shelf package be better?
■ Would a generic program suffice?
■ Is it worth the expense to custom-develop the program?

10. Should an outside consultant be considered?
■ Would an outside consultant provide a more objective approach?
■ Would using outside consultants be more time-efficient?
■ Would a consultant be less expensive?
■ Are the necessary kinds of consultation available?

11. Will the training enhance job performance?
■ Is the program on target?
■ Are targets and goals related to the job or task analysis?
■ Do training goals coincide with areas identified in the needs assessment?
■ Does the program fit the organizational culture?
■ Will the program benefit trainees?

12. Is there a strong evaluation component?
■ Have provisions been made for interim progress evaluations?
■ Are performance standards clearly specified?
■ Will performance be measured at the end of the program?
■ Has follow-up evaluation been arranged?

13. Is the program organized so that it can be efficiently administered?

■ Is the program flexible enough to meet future changes such as shifts in procedures and government regulations?
■ Is the program's length appropriate?
■ Have provisions been made for field testing and debugging?

Factors for Training Justification

By Karen Krueger Brown, co-founder and president of Quest Learning Systems, 1103 Homer Street, St. Paul, MN 55116.

So it's time to justify another training program. Time to dig back through the justification factors you used in previous proposals, to sift through long narratives in books and magazines, and to rack your brains to be sure that you've thought of everything. If you're not sure, you may appreciate the following list of justification factors you never had the time to compile yourself.

Factors for any training mode
■ **Error reduction.** Employees are alerted to common types of errors and taught to prevent them.

For example, data-entry clerks are taught techniques to reduce the number of typing errors they make. Insurance claims examiners are trained to check eligibility dates on claims, reducing the number of payments made to ineligible claimants.

Resulting benefits include improved company image and lower expenses for labor, materials, disability payments, and equipment.
■ **Reduced turnover.** Employees feel less frustration and stress, so they tend to stay on the job or with the company longer. Most companies have statistics on the cost of recruiting and training a new employee, including lost productivity costs.

For example, employees reporting high levels of stress will probably

have lower levels after they complete a stress-management course. Employees are likely to be more satisfied with career opportunities at the company after they take part in a program on the organization's career options.

Resulting benefits include lower expenses, increased productivity, improved morale, and improved company image.
■ **Reduced litigation.** Employees are taught to eliminate behaviors that lead to litigation.

For example, accounts-receivable collectors are taught not to act in ways that often result in harassment suits, or supervisors are taught to eliminate behavior that could lead to sexual-harassment suits.

Resulting benefits include lower expenses, improved morale, and improved company image.
■ **Increased productivity.** Employees are taught ways to increase the speed or efficiency with which they perform their jobs.

For example, salespeople are taught better closing techniques, which leads to an increase in sales. Customer-service representatives who deal with call-in customers are taught tactful ways to end calls that are no longer productive.

Resulting benefits include lower expenses, increased revenue, better service, and improved company image.
■ **Increased standardization.** Employees across the organization learn to perform the same tasks in the same ways.

For example, loan officers are all taught the same criteria for granting loans. All managers are taught to prepare their budgets in the same way, using the same software, procedures, and criteria.

Resulting benefits include less litigation, less of a problem with turnover, improved internal and external communication, and improved productivity (because each department doesn't have to "reinvent the wheel.")

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■ **Increased credibility.** External parties such as bankers and clients are often interested in the competence of an organization's employees. Employee-training programs can increase their confidence levels.

For example, all bank tellers are required to complete a teller training program; employees who complete the program are saluted on an announcement board in the bank lobby. Customer-service representatives are required to complete a customer-relations program that is highlighted in the organization's promotional materials.

Resulting benefits include improved company image, increased sales, and improved morale.

Factors for self-study programs

■ **Reduced training time.** In many cases, the use of self-study courses rather than traditional, instructor-led courses has decreased trainee contact time by 25 percent or more.

Resulting benefits include lower training expenses and less productivity loss.

■ **Elimination of travel costs and time.** Transportation and per diem costs are reduced or eliminated when trainees complete training at their own site.

Resulting benefits include lower expenses and less productivity loss.

■ **Reduction or elimination of instructor expenses.** Instructor time and associated costs are reduced or eliminated; self-study materials stand alone.

Resulting benefits include reduced expenses.

■ **Increased scheduling flexibility.** Trainees can complete training at times most convenient to them and least disruptive of their work. They need not restrict training schedules to times when an instructor is available.

Resulting benefits include less productivity loss.

■ **Increased standardization.** Any type of training increases standardization to some degree. Self-study materials, however, provide the ultimate standardization because all content is presented in writing; instructor incompetence and differences are eliminated as factors.

Resulting benefits include fewer employee errors and associated expenses, because documentation of expectations is provided.

Selling Your Bright Ideas

By Jody L. Pollard, assistant to the director for training, Physical Plant Department, Georgia State University, Box 708, University Plaza, Atlanta, GA 30303.

Several years ago, I was planning an extensive, expensive training program. When my boss's boss asked me to brief him on the project, I anticipated a chance for me to shine. On the day of the meeting, I went to his office, briefcase in hand, and told him about my plans. It was a disaster. I failed, not because my ideas were terrible, but because I was not prepared to *sell* my good ideas.

After that experience, I quickly realized that I was competing for limited resources against other people who also had good ideas. If my programs were to win funding and support, I had to be ready and able to convince others that my ideas were the brightest, the most useable, and the most needed. Selling and training may not seem to complement each other, but both are essential skills for a human resource specialist.

Know thy audience

We in human resources tend to believe that our area of the organization is the most important one. After all, we are concerned with people—their problems, career paths, and development toward goals.

While those things are certainly important to any organization's success, top management is often more concerned with other areas. Is the company suffering from bad publicity? Are sales or productivity down? Is a reorganization in sight? Consider such concerns before you plan to unveil your latest training idea. Remember that training must be designed to meet real needs.

Presumably, you have designed a program to fill deficiencies that were uncovered in a needs analysis. Now you must plan to present your program to the higher-ups. Begin by considering the audience that must "buy" your ideas. What are the individuals' specialties? What are their backgrounds? For example, you may have an instant ally in someone who works directly with the problems

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your program is designed to correct. If your audience consists of more than one person, how do members interact with one another? Such factors may affect the way in which you present your ideas.

After you consider your audience, you will be in a better position to determine which points you should focus on in the presentation and which questions you should be prepared to answer.

Just the facts

When preparing your training proposal, concentrate on facts from your needs analysis—things that can be quantified or measured. Human resource specialists may be comfortable dealing with "soft" information, but most other managers are not. They won't be impressed if you tell them, "production in our Midwest plant seems to be down." Tell them instead, "the production in our Midwest plant is down 17 percent from last year; during the last five years, it has dropped more than 31 percent." That fact will force your boss to take a hard look at the solutions you are proposing.

Don't go near your boss's office with a proposal until you are ready to explain why your idea should be implemented now. The need for your program should be immediate; you should be able to give an important reason for doing the training now. Remember, your boss has to make decisions about which programs to support immediately and which ones to postpone. If *you* can't justify your own program, nobody else will be able to.

Also be prepared to explain the cost of implementing your ideas. Develop a specific budget that you understand and can justify to others. Be ready to convince your audience that your program is the best way that the money could be spent, and that the expense is reasonable for the training that is to be done.

You should outline how you will determine the success of the program. Will you monitor turnover rates for the next year? If so, what kind of improvement are you aiming for? Measuring the success of a program is the mark of a true professional. Your boss is sure to veto an idea that sounds like training just for the sake of training. Convince him or her that you have definite goals in mind and a means of measuring whether those goals are met.

A modest proposal

Your proposal should be brief—no more than fifteen to twenty minutes in length—and you should be enthusiastic about your ideas. As a trainer, you know that delivery influences how well your lessons go over in the classroom; remember that it also affects how well your training idea goes over with management. Keep your audience interested and convinced that you know what you are talking about.

Finally, encourage audience members to ask questions about your ideas; it is the easiest way for you to know and respond to their concerns. If you have done your homework, you should be able to anticipate many of their questions. Don't be afraid to ask, "Is there any other information you need in order to approve this program?" This is probably your only shot at promoting the idea; stay with it until you have satisfied everyone's concerns.

Increase your chances of gaining the support and funding you need. Learning to effectively sell your ideas will improve your understanding of your own ideas and your ability to convey them to others. Only then can you convince your supervisors to support your programs.

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