Training 101

Getting Things Done

Management has been defined as "getting things done through other people." That's easier said than done. How do you get people to work together, candidly exchange ideas, and help each other—without having them get defensive or divisive?

A well-planned and facilitated project review meeting may be the answer. In it, the project manager—say, an HRD specialist working on the design of a new training program—receives objective, candid comments from a group of experts. Here's a case study of a successful project review meeting, and tips for planning your own.

The second half of this month's "Training 101" is a checklist for management-development programs. What does it take to put together a training program that will really help managers manage better? If you thought an effective session required dressing for success, spending a lot of money on state-of-the-art technology, and keeping up with the latest training trends, you may be surprised at the answer. Here are some guidelines for management-development activities that are practical, effective, and tied to the bottom line.

Meetings That Work

By Donald T. Simpson, 294 Laburnum Crescent, Rochester, NY 14620.

It's Thursday afternoon. Terry, a trainer and training designer, escorts his client Dale, a department manager, to a conference room. Terry and Dale are about to take the role of principals in a project review meeting. Terry has prepared for the meeting by discussing the process with his manager and with the review-meeting facilitator. He has helped select the six people who will act as his resource group. He has decided to include Dale, the client, and has briefed Dale on what to expect.

Terry is a bit nervous. His training design and professional approach will be critiqued by experts, people whose opinion he respects—with his client present. He has been assured that the process will be beneficial to all, but he is still nervous.

When Terry and Dale arrive at the conference room, they are greeted by Terry's colleague Alice, the facilitator of today's meeting. The resource group is already seated, looking over some of the project material sent in advance.

Alice opens the meeting. "Good afternoon," she says. "Thank you for your time and effort in this project review meeting. You've been asked to this meeting because you have diverse backgrounds and viewpoints; as a group, you are knowledgeable in both the training process and the subject matter. Your candid and straightforward reactions will assure that a major project—a departmental training program in this case—will be the best we can develop.

"Our purpose here is to be a resource group for Terry and Dale. We do that by providing our professional reaction and input to their program—and by letting them decide what to do with what we offer. We can expect them to listen and to consider our comments. They are not obligated to respond or to act on anything we say here. In fact, I'll ask them not to respond, other than to make sure they understand what you're telling them."

"Terry and Dale," Alice continues after the introductions, "Please give us about ten minutes of background and status on your project. As they do this, the rest of you please feel free to jot down your reactions—things you like and things that concern you."

Terry and Dale describe the way the training needs were determined and the content and design of the proposed program. They also comment on the professional relationships between the two of them and between them and the department. Terry starts to go into some detail about the theory behind the training design, but Alice intervenes.

"I think that's enough to get us started, Terry," she says, and then turns to the group. "This is a time for clarifying questions. It's not necessary to understand everything about the design and the rationale behind it. You should understand enough to react to it, though. Are there any questions for Terry and Dale?"

Some group members ask questions, mostly about the conditions that suggested this particular approach. Alice keeps the discussion from becoming too detailed, and redirects any attempts to discuss or critique the design.

The meeting is 15 minutes underway by now, and Alice moves into the review phase. "Some of you have been taking notes. Good. Let's list what you like about the design and the way Terry and Dale work." On a flip chart she lists the comments from the group members about what they think is especially good about the design. There is little discussion—only a clarifying question or two from Terry and Dale.

Alice pauses to make sure Terry and Dale feel comfortable that they understand the comments, and then asks the group, "Now, what concerns you about the design and the working methods?"

Again Alice lists the group's comments, checking from time to time to be sure that Terry and Dale understand what is being said. Terry begins to explain his rationale behind a particular approach, but Alice quickly intervenes: "Let's just list the comment, Terry, and make sure you understand what was meant. You don't need to explain or respond. You can do whatever you think best later. OK? Let's continue."

About 45 minutes have elapsed by the time Alice finishes listing the comments of the group. She turns to Terry and Dale to ask, "How can this group help you now? We can offer suggestions. We can explore some of the concerns. We can do some potential problem identification. What would be helpful to you?"

Terry and Dale glance at each other, and then ask the group for suggestions and ideas for their program. As the group comments, Alice records the suggestions. She makes sure that Terry and Dale understand what's being said, while reminding them that they need not respond to specific ideas. She keeps the tone of the meeting nondefensive and open.

As the end of the hour draws near, Alice begins to close the meeting. "Let me again thank you for making your time, experience, and expertise available to Terry and Dale. You probably won't know what will happen to your comments and suggestions. But do know that they're very useful and very much appreciated." Terry and Dale thank the group, and Terry, to the amusement of the group, sneaks in a short comment about how he really likes a particular suggestion. Alice rolls up the flip charts and gives them to Terry and Dale, who seem anxious to begin to follow up on a few of the suggestions and work on some of the problems uncovered by the review.

On the way out of the conference room, Dale turns to Terry and Alice and says, "I like what happened here. Do you suppose one of you could facilitate a meeting like this in my department? We've got an upcoming proposal that could really benefit from a review." The smile on Terry's face hardly suggests the nervousness he felt an hour ago.

What is a project review meeting?

Project review meetings are, first of all, meetings between equals, regardless of their organizational standing. The purpose is to provide reaction to a program, project, or approach (including human working relationships), in progress or anticipated, from knowledgeable individuals who may or may not have a direct stake in the outcome of the endeavor.

The process is usually a bit more formal than many meetings, though the group may be collegial. The meeting is structured so that the critiques and ideas given are well balanced and complete—and meet the principals' needs. The review can provide valuable ideas and identify pitfalls and potential problems while there is still time to do something about them. The process reduces the natural defensiveness that people feel as their work is under review.

Before the meeting

Preparation for a review is crucial. Certain activities are necessary to ensure that the time and effort spent in the meeting result in valuable feedback that can be accepted and used by the principal. They should not result in defensiveness or hard feelings. Here are some specific questions to consider:

■ **What is the purpose of the meeting?** Most projects and approaches can benefit from a well-run review meeting. It is important that the principal give some serious thought to just what he or she wants from the review. Just a reaction (pros and cons) from a group of experts? Ideas and suggestions for improvement? Potential-problem identification? The answers to such questions provide a useful basis for selecting the resource people and the facilitator.

■ **What is the focus of the meeting?** This question concerns the content, or boundaries, of the meeting. Do you want to restrict feedback to just the project itself, or will you include the professional relationships involved? Are you reviewing the approach or process used in the project or service? Or only the content? Again, thinking through the boundaries allows better selection of a resource group and facilitator.

■ **Who will facilitate?** Some reviews can be informal, casual affairs, especially among colleagues who have built up mutual respect and trust in working together. But in most cases, a facilitator is recommended. The facilitator can devote his or her full attention to process, and ensure understanding while reducing defensiveness. The facilitator must be sensitive to the principal's purpose, and must keep the group oriented toward serving that purpose. At the same time, he or she must be sensitive to the group and its willingness to supply the kind of information needed. Conflict-handling skills are valuable, but keep in mind that the review meeting is designed not to resolve anything, but to elicit constructive reactions.

■ **Who (else) will be the principal?** Quite often the client and the consultant become principals together. It's an effective approach if the two have a good working relationship. It fosters teamwork, understanding, and trust. On the other hand, it may be better to review the project without the client present. The principal must make that decision, keeping in mind working relationships, personalities, timing, and contracts.

■ **Who will be in the resource group?** Selecting resource-group members who truly know how to be helpful is no small task. They must be willing to be candid and open, but sensitive to the principal's purpose. Help is defined by the receiver, regardless of the good intentions of the givers. Expertise and experience, organizational role, and stake in the outcome of the project should be considered in determining who will be in the resource group.

The usual activities that precede any meeting apply to reviews. It is important that resource-group members get some synopsis of the project before the meeting, along with a statement of purpose and an agenda of sorts. A short explanation of how the review differs from other meetings may be helpful for people who have not previously participated in this kind of effort.

During the meeting

The order of activities suggested here seems to be effective in getting the needed reactions while keeping defensiveness low and acceptance high.

The Opening Statement. The facilitator clearly states, or has the principal state, the purpose of the meeting and what is expected from the resource group. He or she also suggests some general guidelines for the meeting, such as the following:

- keep comments objective;
- be specific;
- stay focused on the topic;
- let the principal decide what's helpful and what he or she needs;
- comment candidly and honestly.

The Background Statement. A brief statement by the principal sets the stage for the review and brings a personal touch to the pre-meeting background material. The background statement should be clear and concise but provide enough information for the resource group to react. The facilitator ensures a basic understanding of the project or process under review; clarifying questions may be asked at any time. The principal need not explain "why" if the explanation is to justify a particular decision. Principals tend to over-explain the project or process rather than let the resource group decide whether it needs additional information.

Clarification. The facilitator can provide a separate part of the meeting for clarification, to ensure that members of the resource group understand enough about the project so that they can react to it. Again, the tone should be nondefensive and concise. Further clarification can take place any time.

Likes. Almost always it is best to list first what the project or process has going for it. The facilitator typically begins the list by asking a question such as, "What do you like about the work under review?" Phrased that way, the question allows the resource-group members to voice their professional opinions without having to justify them.

Listing the "likes" before the concerns allows the principal to acknowledge the valuable parts of the project or process. Later, when working on the problems on the concerns list, the principal might keep the "likes" list in view, to ensure that problems are not corrected at the expense of something valuable. Again, the facilitator acts to ensure that the principal understands what the resource group is saying.

Concerns. After resource-group members say what they like about the work under review, they list their concerns. They need not justify their concerns, although the principal may ask for clarification.

The facilitator faces a difficult task here: he or she must ensure understanding without encouraging defensiveness on the part of either the principal or the resource-group members. Again, the form of the question acts to reduce defensiveness. The resource group says, in effect, "This part of the project is neither good nor bad, but this is what we'd be concerned about."

Stop. The principal may decide he or she has enough information to fill his or her needs, and may ask the facilitator to close the meeting.

Clarification. The principal may want more explanation about a particular concern, including some background and alternatives in dealing with it.

Setting Priorities. The principal may ask the facilitator to have the group place the "likes" or concerns list in some sort of priority order.

Suggestions. The meeting could move into an idea phase, as in the scenario, with resource-group members offering suggestions. The suggestions can be listed with little or no comment, or they might be discussed in more detail.

Potential-Problem Identification and Analysis. The principal may want to use the group to assist in potential-problem analysis and contingency planning. Usually there is little time for this; true potential-problem analysis should be the topic of another meeting.

There may be other options. The facilitator has no set course here, except to support the principal's needs (not those of the resource group, which may want to discuss further a point on which the principal is fairly clear). Whatever the course of the meeting, comments from the resource group are recorded on flip charts or overheads for future use by the principal. Again, the facilitator's role is to ensure understanding without defensiveness.

As the meeting closes, the facilitator reminds the group of the purpose for which it has come together—to provide input and reaction to the work under review, not to resolve issues. He or she thanks the group for its contributions, and reminds group members of any agreements on confidentiality. The principal may want to make a statement of intent; usually it is better just to acknowledge the experts' contributions and thank them.

After the meeting

As with any facilitated meeting, the facilitator and the principal debrief (mostly for the facilitator's benefit). Debriefing is a mini-review of its own, and might focus informally on such questions as the following:

- What went well?
- What might we have done better?
- What suggestions do we have for future consideration?

The meeting documentation (flip charts, notes, overheads, and so on) are the property of the principal.

The principal usually sends a thank-you message to the resource-group members, not just as a courtesy, but as a reinforcement of the process. He or she may want to comment on a particular suggestion or contribution from the group, but it may be better not to.

Even if the principal decides not to make significant changes in the project, the review meeting is a marvelous vehicle for providing expert input and priceless information about the work under review. With a candid, objective resource group, an experienced, sensitive facilitator, and a principal who is open to considering different views, the review meeting can be a critical step in the development of a new project or process. It helps ensure high-quality work, timely and effective feedback, and trust and communication within the organization—while providing an exchange of useful ideas.

Twenty Tips for Management-Development Programs

By Ralph B. Bettman, senior consultant with Performex Management Performance Consultants, The Ferry Building, Suite 3405, San Francisco, CA 94111.

The pressure is on. In today's world, indirect expenses, such as management training, must show a return—or else. The days of accepting the value of management training on faith seem to be over. Making training effective is critical.

There are, of course, many objectives for management training; for example, to inform, to reward, and to improve morale. But the most important objective is usually to change on-the-job behavior. The effectiveness of training, then, is measured by how much managers change the way they manage.

Getting managers to manage differently is never easy. Many of the factors are out of our control—what the company president does, the existence of a crisis, and even the budget we have to work with. But that doesn't mean our hands are tied. Here are twenty ways to make management training more effective—and to increase the return on the training dollar.

Twenty tips

1. **First of all, make certain there is a real need to change behavior, and that behavior change will affect the bottom line.** During training, show how the impact will occur. Training should lead to the behaviors that support important elements such as quality and customer service.

2. **Be sure that the training content fits the need.** Extraneous, redundant, or conflicting content only confuses participants. Offer content that provides participants with only the skills that will help them deal with the existing need. And be sure they recognize the need—or opportunity—to do something better.

3. **Give the participants feedback.** Make sure they get feedback on their managment performance from their bosses and subordinates. Most managers think they're doing well enough. If they didn't think that, they would be taking corrective action without the training. If the needs analysis is correct and your program is relevant, the feedback the managers receive will reinforce the importance of the program. Feedback also provides a great last-minute check of needs and program content—and, a means to enlist upper-management support.

4. **Get senior managers to begin each meeting and support the training.** If possible, get them to lead the training itself. Participants will be more receptive to the training if upper management tells them they will be expected to use the content.

5. **Make the program mandatory.** If you're trying to change the behavior of an organization, then participation in the training should be a must. If some people already know the content, let them help teach, using their own success stories and problems. They will become the strongest supporters of behavior change. And, the shared experience will create peer pressure to use the content.

6. **Make sure the training links the content to the payout.** Participants will be more likely to apply the training content on the job if they can see how applying it will affect their own compensation or the company's bottom line. A class discussion on how the course can help the organization compete may help.

7. **Make sure the content is practical and works.** There is a well-known problem-solving course that teaches a rigorous methodology that is practically never used by participants. The content is too cumbersome. If people don't use training, it clearly is not changing behavior. It's better to err on the side of being too simplistic, giving only content that will actually be used.

8. **Make sure the content is relevant to each participant.** Use recognizable situations and terminology from on the job. Let participants bring their own real problems to class or work on changing feedback they have gotten on the job. Use company identifiers on the materials (such as workbook covers) so that the program is perceived as "the way we do things here."

9. **Be sure that the content and existing systems are consistent.** If you already have a performance-appraisal system, don't teach a different one, even if the differences are only semantic. A key to behavior change is constant and consistent repetition. Otherwise, people just

wait for clarification before applying the content on the job. Use terms, forms, and procedures from the existing systems in your training content as much as possible.

10. **Let trainees participate in the learning.** Adults learn better when they can relate their current experiences to the training content. Experiential exercises, discovery learning, actual application to real situations, and group discussions are all important learning methods. Some leaders shy away from them for fear of losing control—or of being asked a question they can't answer. But there are techniques for control and for answering the unanswerable; be sure your trainers know them.

11. **Let the participants solve a real problem during the training.** The first application of a method is always the hardest because the participant doesn't know what to expect; it takes time, and he or she usually isn't very good at it. If the method can be tried first in the workshop, the participant can be assured success and will be much more likely to try the new method back on the job.

12. **Give ample opportunity for questions.** Even the best instructor can't know every situation the participant will face, so encourage discussion and idea sharing during the training. Make sure that each participant feels that he or she has discussed all doubts and hesitancies, and that the group has provided good, practical ideas for dealing with them.

13. **End the training with an on-the-job assignment.** Give participants time to think about the assignment during the training so they can ask questions and perhaps even practice. That predisposes them to actually doing something with the course content after the training. Try having them apply every method taught and report on their success at a post-training meeting.

14. **Get their supervisors to review participants' on-the-job application plans.** Directly after the session, supervisors should ask, "How are you going to use the training?" That lets participants know that they are expected to apply the training.

15. **Have their supervisors review the success of trainees' on-the-job applications.** That helps convince the supervisors that they are getting value for their training budget, paves the way for coaching and performance review, and makes it clear to participants that the training had a purpose.

16. **Support participants as they try out new methods.** A scheduled post-training counseling conference gets workbooks and application plans back on top of trainees' desks. It also helps push participants past such easy excuses as "I forgot," and helps establish the role of the trainer as a counselor, if that's an objective.

17. **Hold follow-up meetings.** Get the class back together to review the success of application efforts. The follow-up provides an opportunity for refresher or reinforcement training; peer pressure will prod people into performing.

18. **Recognize trainees who exhibit the desired behavior.** For example, you could make the awarding of course certificates dependent on trainees' bosses confirming on-the-job achievement.

19. **Have participants share their responses with those who originally provided feedback.** If a participant acknowledges an opportunity to improve, in most cases, he or she will make the effort. If the acknowledgement happens in front of other people, the trainee is more likely to make sure the effort is successful.

20. **Track success and achievement of the group and report it back to trainees.** Being part of a successful peer group is motivating and exhilarating for most people. If you can show that trainees' efforts are achieving success, particularly if that success helps the company's bottom line, more success will surely follow.

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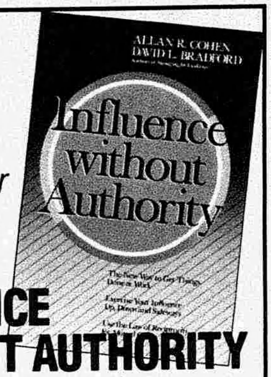

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The bottom line

You'll notice that I haven't listed "flashy" trainers, proper classroom size and layout, and the use of television and other devices. Research suggests that such elements are really peripheral. If the twenty methods above are used, the quality of the leader or the "features" of the training have relatively little impact. People who "know they need to know" will learn under the worst of circumstances.

Management training is not an end in itself; it is a means to an end. The desired end is on-the-job behavior as it has been taught. If the trainer structures the complete participant experience in the ways described above, and if change is important to the participant, then on-the-job behavior change is almost inevitable.

As companies scrutinize their allocations of scarce dollars, training is frequently cut back. But training that provides a return—a change in behavior—can be one of the best investments an organization can make.

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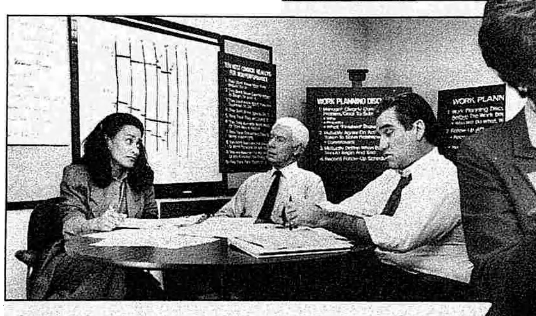

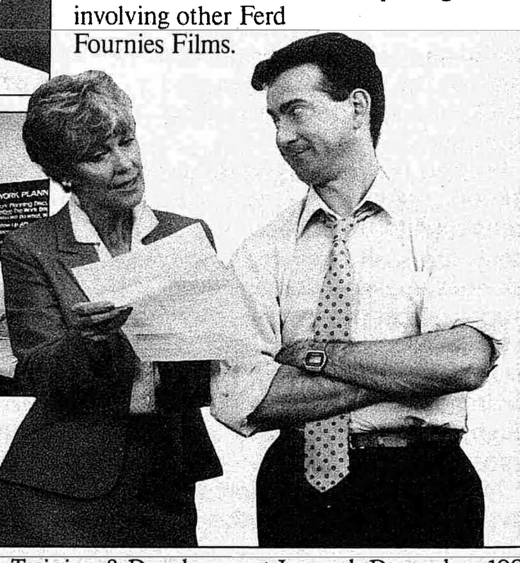

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