

KEY ELEMENTS TO AN EFFECTIVE TRAINING SYSTEM

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Corporate training is a dynamic process designed to achieve specific business objectives. Therefore, any training program, no matter how instructionally valid it may be, cannot be considered successful if the objectives are accomplished only in the training and not in the real world. Unless the training is implemented and the lessons applied out on the job, objectives will not be achieved and the training will not be effective.

The key to effective training is *implementation*. There are many approaches to developing training programs. Even among systematic approaches to training development, there are many models. If left to competent and experienced instructional developers, each of these models is capable of producing a quality instructional program. But, as we all know, nobody will learn anything if the program stays on the shelf, regardless of how effective the instruction is. Most training development models

fail to include a systematic approach to implementation. Training must be viewed as a complete system that encompasses instruction and evaluation as well as implementation.

To develop a truly effective "training system," one that incorporates implementation, five subsystems must be included:

- Developmental System
- Internal Training System
- Performance System
- Installation System
- Evaluation/Modification System

Two subsystems, *Performance System* and *Installation System*, are key to the implementation of an effective training system. Since these two elements are overlooked most often, they will be described in greatest detail.

1. *Developmental System*: A developmental system encompasses everything needed to produce an instructional training program from the analysis of job requirements to the design and development of courses and materials.

This can be an in-house training capability or a combination of in-house and outside resources. For example, XYZ Corporation hires a training firm to develop a training course for their sales representatives. The subject matter experts may be the regional sales managers. They will work with the training firm's course developers to develop the course.

2. *Internal Training System*. An internal training system provides the internal training staff with the basic instructional skills required to produce and support training programs. This includes training in task analysis, developing objectives, structuring instructional strategies, writing course materials, providing lesson plans, planning lectures, packaging self-instructional materials, and so on.

3. *Performance System*: The performance system, a frequently overlooked element in most development models, facilitates the transition of skills and knowledge from the training to the job. An effective performance system emphasizes transfer exercises and job performance aids.

• **Transfer Exercises:** Transfer exercises are derived from an analysis of the program's performance objectives. Transfer exercises incorporate the objectives and apply them to real-world situations. For example, assume the following performance objectives for an advanced sales training course: ability to identify a prospect's business need; ability to devise a solution to that need; ability to present the solution to the decision maker; and an ability to close the sale.

A good transfer exercise might require each sales trainee to list five or 10 accounts which he/she targets for sales call. As the trainee moves through the sales process he or she checks off each step of the planning, presenting and selling of that account as it was described in the course, until the account is effectively sold. These exercises provide a means to transfer what has been learned in the course to the job environment in a most effective and efficient manner. They bridge the gap between the classroom and the "real-world."

Most training programs leave the trainee with nothing more than newly acquired knowledge and skills and a blank piece of paper. It is up to the trainee to figure out how to apply the new knowledge and skills to the job. Transfer exercises move and guide the trainee toward effective execution of the performance objectives.

• **Job Performance Aids:** Job performance aids also facilitate the transfer of new knowledge and skills from the course to the job environment. Performance aids are introduced during the formal instruction phase of the training system. Performance aids are designed to improve the trainee's ability to process information and to perform job functions correctly and efficiently. Properly designed, performance aids reduce the amount of decision making necessary to perform a task. They also reduce the need for trainees to remember important procedures and information.

Performance aids can be designed in a variety of formats, in-

cluding flowcharts, tables, matrices, checklists, specialty slide rules, color-keyed overlays, computational tables, and so on. Each of these formats is a pre-packaged decision and performance control device. Performance aids may be integrated with case study simulations to assure that the trainee understands how they relate to his/her on-the-job environment and tasks. Sample aids might be an "Account Plan," a "Decision Analyzer," a "Computational Worksheet," a "Need/Solution Grid," and sample formats for business letters.

These performance aids are not merely pieces of paper to be completed by the trainee as a paper exercise. Rather, they are structured so that they take the essence of the required knowledge and skills and enable the learner to apply them to specific performance objectives on the job. It is our experience that trainees see the inherent value of these performance aids and have reported during validation sessions that, for ex-

ample: "This is the first time I really saw what my job consists of . . . this is what I've been doing. It sure would have been nice to have had this when I first came on-the-job." Or, from the sales manager, "I wish I would have had this the past two years, it would have made my life easier."

4. **Installation System:** The installation system, the second frequently overlooked element, includes the information and controls required to install and implement training programs. The installation system provides the immediate managers or supervisors of trainees with the information needed (1) to administer the training (if the course is taken in the field), (2) to monitor each trainee's progress as each applies to what he or she learned, and (3) to evaluate and counsel until desired performance is achieved.

• **Administrator's Guide:** For example, if training is taken on-the-job rather than at a training center, an administrator's guide provides complete instructions for

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planning, conducting and controlling the training.

It emphasizes ease of administration and effective implementation. Used by either a designated trainer or by the line manager, the guide motivates the individual to the importance of the course and to his/her role in the process. It outlines the content and provides step-by-step instruction so the course administrator can assure that each trainee processes through the course successfully.

A "Trainee Progress Record" specifies key milestones to allow the "administrator" to monitor and control the progress of each trainee, administer criterion tests and verify course completion.

• *Manager's Guide:* The next link in the implementation chain is participation of the immediate supervisor in monitoring the application of the job skills learned. A manager's guide orients immediate supervisors to the training program. It provides guidelines for working with the trainee on the job when he/she has completed the formal course. The effectiveness of

the training program will not be fully realized unless line managers understand the elements of the program and can guide and assist trainees in the program's execution in the specific environment in which they operate.

For example, a key performance aid in a sales manager's guide might be a "sales representative's controller." On this aid, the manager lists each of his or her salespeople and establishes guidelines and time frames for the achievement of sales objectives. Checkpoints would include the following performance-based activities: demonstrating proficiency in specific product knowledge; opening an account plan; obtaining an initial appointment for a sales call; identifying the decision maker; qualifying the account; defining the need; presenting the solution; defining the solution; closing the sale; protecting the account; and expanding the account.

• *Executive's Guide:* Executive support is critical to the success of a training program. The executive's guide introduces the course, identifies the impact of the training on the business need, defines the critical nature of his/her role, and the benefits of effective implementation. It includes a checklist to track and coordinate the responsibilities of each key participant.

5. *Evaluation/Modification System:* An evaluation system enables an organization to evaluate the effectiveness of courses in achieving specific business goals. This requires instruments and methods for sampling the quality of the curriculum and job performance to determine whether, and to what degree, goals are being accomplished.

Criterion tests for each unit of instruction help to control and encourage trainee progress, focus attention on key instructional objectives and provide a means of remediation. Exams assure that trainees are proficient in applying the job performance aids introduced during the courses. And, they are an administrative aid in measuring achievement and processing trainees through the cur-

riculum.

The added benefit of an effective evaluation system is the information it provides to managers training for decision making regarding modifications needed in the training program. In this way, managers can make knowledgeable decisions to modify programs and to increase performance and productivity.

Don't Leave Too Much to Chance

An organization can achieve significant benefits by installing a "training system" that incorporates: (1) a systematic process to design and develop effective training materials that can stand alone (Developmental System); (2) a means to prepare training specialists and instructors to accomplish their roles (Internal Training System); (3) tools and techniques to transition trainees from the course to the job (Performance System); (4) materials that allow supervisors to support and monitor trainee progress on the job (Installation System) and (5) a means to measure effectiveness and control system output (Evaluation/Modification System). The design of most training programs fails to include a Performance System and an Installation System.

Training is much more than simply good instruction. Instruction, even if it is systematically designed, is effective only if it is used. Thus a complete training system incorporates into its design both the transition of skills application from instruction to the job, as well as the management and organizational structure in which the skills must be performed. Any training that does not include these elements into its design leaves too much to chance. The goal of an effective training system is to make sure that good instruction is both received and then used.

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