

CHAPTER 1

WELCOME TO TRAINING

Ann: I thought I was joining the training group, but they had another name when I got there. Now we're called "Performance Development."

Al: I saw the new name on the web page.

Ann: From what I can tell after only two weeks, it's still mostly training going on. You know, this name thing is interesting. Two of my classmates from grad school got hired into training and development groups. I'm in performance development now. Another has the title, curriculum architect, would you believe? Still another is an instructor. And yet another is a consultant, plain and simple-- a road warrior for one of the big accounting firms.

Al: One of the guys in our group is now the "web training manager."

Ann: It looks to me like people in our business can be defined by *what they do mostly* or the *people they serve* or even *the services they want to move towards offering*.

Al: I see what you mean. I could use a better fix on the field. I'm interested in what training is today and in the future, especially with the performance movement and new technologies. Getting clear about all that would enable me to explain it better to my customers, and even my family. You know, my parents have never really understood what I do for a living.

Welcome

The purpose of this book is to respond to questions just like the ones Ann and Al are raising. Ann, Al, their customers and sponsors, and even their families, seek a contemporary view of training and development. They want a picture of the field that incorporates the opportunities and concerns generated by new organizational goals, new customers, international vistas, new technologies and the performance improvement movement.

That's what we will do here. We'll answer the questions that we believe are on your mind. Not yet of concern to you? We'll attempt to put them on your plate for consideration.

Here we're attempting to welcome you again to the charms of the training profession and to provide you with facts, figures, examples, and reasons that will help you rekindle the interest of others too.

This book is not a how-to-do training technologies, or a how-to-do performance consulting. It isn't even a how-to-do training, although you'll find descriptive and detailed chapters on topics like analysis, evaluation, and informal learning. Instead of how-to, we've focused attention on why-to, on touring the terrain and possibilities, on providing assistance in thinking about training, and in positioning it in a world with high expectations for results, speed, and performance.

Technologies and performance goals supply the backdrop for the book. In it we look at services, products, practices and standards associated with training and development in a world where performance improvement and learning technologies are everywhere.

Is this book for you?

This book is for you if you've found yourself wondering:

Who am I? Who am I going to be? What about my career?
What kinds of skills, knowledge, perspectives and alliances will
be required? What should I be thinking about and planning for?
Towards waht should I be leading my unit and organization?

What new approaches are on the horizon? What about the
tried and true?

Is greatness different today than it was before? What is great
training? Isn't great training what it has always been?

Is the classroom dead?

Must I become a web developer? Must we all become web
developers?

What difference will all this technology make? How can I play a
role in turning hype into reality?

What does all the talk about performance mean for me and my
colleagues?

How can I explain all this to my customers? How can I position
and educate them?

How do I plan more effectively for my unit, organization and
self?

How do I prove the contributions we're making? How do I
improve the contributions we're making?

What are the emergent possibilities for our business? For me?

This book is for you if the people around you are saying:

What difference does training make?

Why don't we just change your title from trainers to
performance technologists?

Pick a learning portal and get back to me with your
recommendations.

I'll work with the executive committee to pick the learning
portal and let you know.

Pick a learning management system and get back to me with
your recommendations.

I'll work with the executive committee to pick the learning
management system and let you know.

Why are you talking to me about this other stuff? Just train them. That's what we've always done. That's what they expect and like. You guys are good at that.

Should the training and Human Resources people be doing things differently, given our global initiatives? Shouldn't you be doing more than just classes? What else could you be doing?

How can we capture more of the smarts of our people? I'm concerned because we're losing so many to retirement, and to other companies.

What is it you folks have been doing?

How do we enhance informal learning here?

I went to a conference and really liked what they said about knowledge management. How can we use that in what we do?

Can we move 75% of the training to the web by the third quarter? If not then, when?

In a nutshell, what's happening in training and development that can help us here?

How does the book work?

Beyond the Podium is divided into two parts, with four chapters in the first part, and six in the second.

Part I offers the basics. In it we define and position training, focusing on eternal verities, such as the elements of great training no matter the delivery mode, and instructional design, analysis, and evaluation.

Chapter 1: Welcome to Training

In this chapter we describe the reasons for the book, how it works, how we're defining training, and why we think the topic deserves your attention and enthusiasm.

Chapter 2: How do we figure out what to do?

This chapter is about performance analysis. It serves as the underpinnings for the shift from training to performance, where analysis helps

professionals figure out what to do and then sell solution systems within the organization.

Chapter 3: What is great training?

Some things don't change all that much, and here we visit the enduring aspects of the work. The examples are modern, including e-learning sites, but the emphases on meaning, purpose, activity, and humanity remain.

Chapter 4: How do we prove our contribution?

We provide a lively tour of the options that range from goal based to goal free evaluations, from Kirkpatrick to Phillips, and from interviews to focus groups to online data gathering.

Part II looks at learning and performance technologies, informal learning, knowledge management and the future.

Chapter 5: What does performance have to do with it?

In this chapter we discuss the halting shift from training to performance. Why? How? Who? Where? Why should a trainer or HR professional attend to this issue? How can we retain a commitment to learning and also enhance performance?

Chapter 6: What are our technology options?

Here we survey the possibilities, applauding the options and admitting to the constraints. We'll look at the upsides and downsides of familiar media, such as audio and video, and introduce videoconferencing, DVD, and wireless technologies.

Chapter 7: What about the WEB?

Chapter 7 is nothing but net. Here we look at the implications of the Internet for the things training and development professionals have always wanted to do. Our enthusiasm, however, is tempered by caution. We also review what's necessary to begin to take advantage of e-learning and online performance support.

Chapter 8: How do we use informal learning?

What is informal learning and how can professionals nurture not snuff it? We look at the many ways informal learning is currently happening in organizations, and how to play positive roles in the movement.

Chapter 9: How do we use knowledge management?

Here we define knowledge management and encourage a big tent view of training that includes many approaches and tools associated with KM.

Chapter 10: Where to from here?

We have opportunities and concerns that can and will keep us up at night. This chapter presents eight thorny and intriguing topics looming on the horizon:

- E-business and training and development*
- The object of all this*
- New roles and permeable boundaries*
- Taming choices*
- International vistas*
- The knowledge cocoon*

---*Career self reliance*

---*Sorting a pile of this from a pile of that*

Chapter features

The chapters follow a pattern. You'll find:

Opening dialogue. Meet Ann, Al, Carlos, Omar, Herta, Minjuan, Brock and many more people just like us. They're talking about training and development and framing the issues that we discuss in each chapter.

Friendly definitions and discussions. We'll attempt to crystallize the subject, and then to explore many of ways of thinking about it. Our main focus is on why it matters. Why should a training and development person pay attention to evaluation, knowledge management, object technology or informal learning, for example? In chapter 4, we examine many ways of defining and doing evaluations. In chapter 7, we do the same with e-learning, and in chapter 8, we tour informal learning opportunities, from breakfasts that boost repair skills to online communities of practice.

Questions & Answers. The chapters are arranged around the questions that we think are on your mind. At the same time, we've established a table in each chapter that presents questions you and others would be likely to pose and answers for them. Is training dead? I love my job the way it is, do I have to change? Why are you writing about training when performance is what's important? Why are you writing about performance when my job is training? What might a training professional bring to the knowledge management effort? These are just a few examples of questions (and answers) that are peppered throughout the chapters, focusing on concerns we know you and your sponsors have.

Time sensitive resources. Got an hour? Got a day? How about a week? Every chapter includes suggestions about how to spend limited moments boning up on the topic at hand.

Extended resources. While we attempted to avoid writing an academic text thick with citations, we also tried to give credit where credit is due. This wasn't easy. Each chapter includes many resources honored for their contributions to our thinking, with hope that readers will pursue them further.

Spotlight features. Thiagy. Marc Rosenberg. Margo Murray. Jack Phillips. Zhongmin Li. Ruth Clark. And many, many more. Each chapter features an interview with experts and practitioners, people with something to say about the chapter subject. In vivid ways, and with peeks at their personalities, we provide multiple perspectives about each chapter topic.

Briefings. Every chapter, except number 6 and the last, includes a briefing that summarizes key points. These presentations were constructed with the sponsor in mind. What do they want to know about the topic? What concerns them? What's important here? Our purpose is to help readers to carry out customer and sponsor education.

Technology everywhere. Two chapters (6 & 7) concentrate on technology, but every chapter reflects the way it permeates the work that we do.

Performance everywhere. Two chapters (2 & 5) concentrate on performance consulting and solution systems, but every chapter reflects the way performance concepts permeate the work that we do.

Defining training

Let's start at the beginning.

What, then, is training? Let's agree to a generous and big tent definition. We recognize that reasonable people could and will quibble here.

Training, then, is what the organization provides to help its people to become more effective and satisfied individuals and employees.

Training experiences can be long and elaborate, such as the curriculum involved in the development of a surgeon, or short and sweet, such as a half-hour class introducing sales people to a new parts database. Some training is formal, such as a class or video product rollout, or informal, which might happen when a colleague helps out with new software. And training can focus on getting the job done; this happened when a razor blade company taught its operators to use a new piece of equipment. Or it can be broader in purpose, more educational in nature, such as when a computer company offered workshops to its manufacturing employees about learning-to-learn and English as a Second Language.

Expanding Purposes

In the old days, when you said 'training,' it evoked a vivid picture of a group of participants gathered together in a classroom for the purpose of learning to do their jobs. An instructor stood at the front of the room, perhaps at a lecturn, on the podium. Now, in most organizations, while that picture still resonates, much more is expected of the training enterprise and of training professionals. Table 1.1 presents widening purposes for training.

(Insert Table 1.1 about here)

New purposes for training are dwarfed by the even more dramatic and changing face of training. The enterprise is not at all what it used to be. It just plain looks different.

Expanding Approaches and Roles

Lakewood Publishing's annual training census reported that in 1997, 81% of training in organizations with more than 100 employees occurred in classrooms. By 1998, classroom training had slipped to 70% of the offerings. In the not at all distant past, the world of training was podium oriented, focused on four walls, presentation skills and group dynamics.

Certainly, those words and domains retain resonance today, but they are now joined by new emphases: the WEB, systems, partnerships, performance and knowledge bases. Obviously, by most measures and to some extent, now and in the near future, we confront fresh possibilities, responsibilities, and relationships.

Table 1.2 and 1.3 call out these advancing approaches and roles. Chapter 10 discusses them in more detail.

(Insert Table 1.2 and 1.3 about here)

Individuals and organizations, of course, vary in how far along they are on this continuum of change. Some are already engaged in the shift from the sage-on-the-stage to the guide-on-the-side. Perhaps they are at the table when critical decisions about the business are made. Others, perhaps most, admit that they and their organizations are inclined in those directions, pressured by more competitors and more reasons to involve vendors in the work of the organization. The Training census found that 40% of training is now coming from outside sources.

What is certain is that no matter where you work in training and development, the people next to you and around you must begin to think hard about new ways of being. The opportunities are just too tasty to ignore. The expectations are pointed. Cost pressures and far-flung employees and customers demand immediate responses. And customers grow increasingly impatient for tangible contributions to the goals that matter to them.

Why is Training Important?

For all changes that are happening, one aspect remains stable. Training is popular. It is perceived as critical to individual and organizational success. Training magazines' annual census reported that 56.6 million Americans received some formal training in 1997 and 54.5 million in 1998.

Money and hope are now more firmly associated with the training enterprise. In fact, education and training, once the place where employees went to wind down their careers, has become a pretty good place to linger and grow. This halo extends to Wall Street, whose quickening interest in the field was heralded by a cover in Barron's. Both Training and Development and Training magazine have also acknowledged the emerging excitement about the business case for training and development. Merrill Lynch estimates that 39 IPOs and \$3.4 billion in equity was invested in new education and training businesses in the last five years of the century. W.R. Hambrecht & Co. (<http://www.wrhambrecht.com/research/newsletters/wrh/issue002023/index.html#elearning>) now covers e-learning enterprises in ways that are parallel to their investment coverage for wireless technologies, electronics, finance and health industries. IDC (www.idc.com) is predicting that e-learning will be a \$14 billion dollar business by 2004,

a stunning number when compared to the \$54 billion total reported by Training magazine in its year 2000 census.

What, beyond habit, is generating all the interest in education and training? Perhaps it is the flood of change with which employees must contend. There is a plethora of new products, technologies and customers. Leaders recognize that a shift from analog to digital, for example, or the introduction of Kosovan or Somalian refugees into an HMO, create development needs in employees.

Globalization too is creating demand for training, since an employee charged with negotiating contracts in Uzbekistan is sorely challenged. So too is the accountant from Lisbon who will be making his first trip to Detroit or the new Mac Donald's franchisee from Moscow. Their cravings for training and support are enormous.

Many thus turn to training because they want to help employees ready themselves for their work, in particular, for the unforeseen, such as circumstances they might confront in negotiating in Uzbekistan, or when a customer or computer does the unexpected.

Another force for change is government mandates, requiring employees to be trained about topics such as safety. Close kin to government mandates for new and refresher training is risk avoidance. Outcomes from lawsuits can be more positive for organizations when they demonstrate and document serious efforts to address concerns before they endanger people, relationships, reputations or productivity. Training represents one key approach to mitigation, for example, for sexual harassment. Training's census 2000 includes a stunning factoid: sexual harassment training is the fourth most prevalent type of training, with 90% of all organizations doing something in that area. This grabs even more attention when

compared to the topic that is slightly more popular, performance appraisals, and just slightly less so, leadership.

Cost can't be ignored as a motivator for the renewed interest in training and development, especially for technology delivery. Rich options are now available with appeal to even the stingiest organization. For example, a graduate student at San Diego State University was delighted with a snappy online e-commerce 'course' that cost \$7.95 and was offered by Element K (www.elementk.com).

Executives display tenacious preference for training, continuing to believe in quick fixes delivered by the training unit or external training and development vendors. A sad-but-true example was provided by one leader's solution for a work team that just couldn't get along. The executive pointed to a binder that housed a video-based team-training module with certainty that it was the answer to the team's problems. When pressed on the issue, she was willing to consider bringing in a dynamic 'trainer' to offer a class on team dynamics.

New technology lures as well. Even Jack Welch, famed leader of GE, caught the e-learning bug. He has mandated that 50% of their training be delivered online. Qwest Communications is now pushing for 100% of its training online. While the promises are tantalizing, too often the execution is idiosyncratic. The benefits remain to be seen, creating a pivotal role for training and human resources professionals.

Beyond impulse and entrenched habits is reality. Does training and development also attract its landmark business because of concrete contributions? Peter Drucker's views appear to be somewhat optimistic. In his classic 1992 article in the Harvard Business Review, Drucker noted that "knowledge is the primary resource for individuals and for the society overall. Land, labor and capital—the economist's traditional factors of production—do not disappear, but they become

secondary.” [p.95] Thomas Stewart also recognized the centrality of intellectual capital, although he certainly does not assume that knowledge is owned and nurtured only by the training department.

Stewart cited a 1995 study by The National Center on the Educational Quality of the Workforce, “In a report issued in 1995, which controlled for factors like age of equipment, industry, and establishment size, EQW showed that, on average, a 10 percent increase in workforce education level led to an 8.6 percent gain in total factor productivity. By comparison, a 10 percent rise in capital stock--that is, the value of equipment--increased productivity just 3.4 percent. Put another way, the marginal value of investing in human capital is about three times greater than the value of investing in machinery.” [p.85]

A California State University Northridge study for the California Employment Training Panel (ETP) found the impact of training on employees to be almost too good to be true. Dr. Richard Moore identified \$400 million in benefits for a \$73 million dollar state investment in training. New employees, veterans and entire organizations profited, as Moore found increased worker earnings and organizational growth, and reduced unemployment. The ETP press release (June 28, 2000) noted that 45 states have ETP-like entities, providing publicly funded worker training to selected organizations and groups across the United States.

ASTD’s Bassie & McMurrer (1998) presented preliminary evidence showing that companies that invest more heavily in training are more profitable. These findings are based on a sample of 40 publicly traded firms across many industries. Although these results do not meet standards of statistical significance, they are tentatively encouraging. After comparing two groups of companies—those whose average 1996 expenditures per employee placed them in the top half of training

expenditures vs. those in the bottom half, they reported that companies in the top half had higher net sales and higher annualized gross profit per employee. While caution about claiming causation is appropriate, the relationship intrigues.

Bassie & Van Buren (1998, 1999) have worked to tease out the impact of training on business results. They used a statistical technique to categorize participants in ASTD's Benchmarking study as "leading edge," seeking to discern organizations judged to exemplify the best practices of the training industry. They then demonstrated how these leading edge training investments resulted in higher performance compared to the larger Benchmarking sample. Leading-edge firms, with increasing resources devoted to training, technology and outsourcing, correlated with better sales performance, profitability, and quality of products and services. Effects were greater with such commitments invested over time, according to Bassi & Van Buren (1999). Companies that increased their training expenditures per employee and as a percentage of payroll, and the percentage of employees they trained from 1996 to 1997, improved their performance over that same period.

Questions & Answers

The following table presents typical questions and suggestions for responding to them. Use this table to craft responses that are tailored to your context. This Q&A is directed at the reader; Q&As in subsequent chapters are meant to help training professionals respond to likely sponsor and customer queries.

(Insert Table 1.4 about here)

Getting Smarter about Training and Development

How can professionals update their knowledge about the field? One answer, of course, is this book. We hope it is a trampoline for new vistas and continuing professional development.

Time is always a factor. Table 1.5 attempts to match development needs with the time you're able to invest.

(Insert Table 1.5 about here)

Spotlight on People

Cathy Bolger

Dr. Cathy Bolger is a San Diego based training professional in the best of the familiar mold, garnering kudos for her ability to stand up and train. She is very, very good at teaching and delighting the people who take her classes. Cathy offers Presentation Skills, Meeting/Facilitation Skills, Conflict Resolution, and Stress Management classes to corporate and government clients. She also facilitates outdoor team-building experiences. In addition, Cathy enjoys a long term relationship with the Center for Creative Leadership and through it, she coaches managers using data from 360-degree feedback instruments and assessments.

The Hard Parts

Bolger's clients are, like most, eager to buy a class, schedule the room, and fill it with participants. Cathy acknowledges that even her much appreciated events are only a portion of the solution critical to achieving strategic goals. She believes that the shift to performance improvement perspectives is indeed real, for those who "get it." She continues, "For instance, trainers are starting to see themselves as "brokers" of services as part of a solution system. However, many are still doing what they have always done, which is to use a training class as a solution."

As someone who has offered many classes repeatedly, she admits a personal challenge familiar to training professionals, "Staying fresh can be a challenge. I try to treat every coaching session or training as if it is an athletic event. I come well rested and well prepared. I take a break (could be a day a week, a month or a year) if I find myself

getting a bit stale. For instance, I cut back on my outdoor teambuilding facilitation for a few years, and just recently have been scheduling more work as I again find it very enjoyable.."

The People are the Pleasure

While technology is a growing influence on our field, and Cathy uses it as a productivity and communications tool, it's the people she coaches and teaches who make her eyes light up. She put it like this, "I enjoy helping people move in a positive direction toward their goals, whether it is giving a better presentation, leading a better meeting or balancing task and people skills." She also is actively involved in the local ASTD chapter and notes that networks of colleagues have added to the joy she derives from her work.

In the Future

When asked about advice for people new to the field, Bolger highlighted quality and customer focus. She said, "Become known as someone who has good service skills such as quick follow up, openness to feedback and good interpersonal skills." Cathy also remarked on the importance of professional associations and technology.

Lynn Richards

From a position as a learning center manager with Hewlett-Packard, Lynn Richards moved to Peregrine Systems, an infrastructure software company. At up and coming Peregrine, she leads a group responsible for, among other things, providing software training and certification for external customers and channel partners. Lynn now heads up a cadre of 28 instructional designers and developers, instructors and technical experts. Lynn notes that she is responsible for "making sure that her people are ready for what needs to be done today and tomorrow."

From Training to Training and Performance

In over 20 years of experience at companies as diverse as Kimberly Clark and M&M Mars, Lynn has seen it all. Her career mirrors trends and transitions typical of the larger field of training and development. She has moved from delivering training to analyzing, designing, and developing learning products to her leadership role. Now she sees herself making certain that learning and education are aligned with the business goals. She is responsible for standards and processes that will result in integrated solution systems. Lynn puts it this way, "I've evolved as the profession evolved and continue to grow and learn."

For Lynn, the shift from training to performance was natural. She was there early, and now she's delighted to be joined by so many others, including the major professional associations. She remarked, "I believe the excitement of others is still in its infancy. The process of moving through awareness, understanding, to application is slow. I see it requiring someone in a group, not necessarily the manager, to champion and model the shift to performance." Lynn's natural sense of systems is at work here. She recognizes that the commitment to

analysis and integrated solutions has to be in the minds and hearts of leaders across the organization, not just in human resources and training.

Lynn recognized that some colleagues in our business resist. She said, "Some education and training colleagues are fearful that their classroom 'business' will be threatened and reduced. I wish that they could see the shift to performance as merely that, a shift, rather than a possible 'take away'. By partnering, we can show how combined solutions will not only provide better solutions but also generate greater satisfaction from our customers."

The Hard Parts

Lynn admits that it isn't always easy to facilitate group processes that will result in shared standards and efficient procedures. Her job is to serve a far-flung customer base, to implement these high standards and processes, as well as to acknowledge and appreciate individual differences. "To reach an overall balance between often times competing needs and priorities, the scale will tip from one side to the other over the short term. One group of people will be temporarily better off or happier. I just have to ride this out like they do, keeping the longer term vision and goal in mind, in view of the staff, and encouraging them throughout."

The Joy for This Developer is in the Development of People

Lynn remarked on the pleasure she derives from perceiving growth in the staff. One instance she selected is how she experiences their successes, the gratification she feels when their high quality deliverables lead to profitable business results and increased customer satisfaction. She is motivated by how much she learns from staff members, how her development process is also continuous. Lynn cited examples, such as seeing the design and development of a web site emerge and benefiting from significant improvements in instructional design/development processes via recommendations from staff members.

A Judicious Commitment to Technology

Lynn acknowledged that she chose a prior position because it enabled her to explore electronic learning. She comments, "I'm especially excited about the possibilities offered by Intranet solutions including: just-in-time access to learning and information, independent self-paced and scheduled options, and how such options fit with existing instructor-led resources. Managers in the business units are more easily attracted to cost-effective learning solutions offered at the desktop. They see these solutions as more efficient than classes. Of course the obvious travel cost savings are real, but also the accessibility and customization possibilities attract favor."

In her new role at Peregrine, she sees increasing opportunities for technology, with an emphasis on integrating classroom and electronic options. Lynn highlights the importance of customer readiness for emergent technologies and integrated systems. She points to a problem that is omnipresent in the training business, "There seems to be a wider excitement about web technology than there is a focus on

when it is appropriate to use it or what must be done in the organization to support successful implementation."

In the Future

Lynn was a perfect person to ask about advice about the future:

- Create a professional vision, think about what you want to DO with these skills so that there will be a context and purpose for your learning
- Work to become clear about your personal values, principles, standards, boundaries, and ethics so that if (when) confronted with unusual or uncomfortable situations, you will be slightly prepared to deal with that situation. One example she provided was about the time pressure that inevitably challenge quality. Another example reached into history to describe a request from a 'boss' to duplicate commercial videotapes.
- Continuously self assess so you are aware of what satisfies you and in what areas you are strong and in need of development
- Cultivate relationships with successful practitioners so you can learn from them
- Be prepared to be flexible about inevitable constraints
- Take as wide a view as possible, continue learning so that you have more options for employment
- Keep your defenses low so that you are ready and able to learn new things and respond to advances in the field
- Learn to ask for help
- Collaborate generously

Terry Bickham

A long time US Coast Guard officer and manager of a large training center, Terry Bickham now manages a training unit at Peregrine Systems. When we interviewed Terry, he'd just retired from a long, successful career in the Coast Guard.

Terry described his work with the Coast Guard this way, “ ... as producing skilled Coast Guard men and women who save people from the sea and protect the sea from people.” Peregrine is a business to business dot-com.

Technical Training with a Focus on Performance

The Coast Guard has received kudos for its commitment to performance improvement. Terry’s efforts at the Petaluma training center provide a model for large organizations attempting to infuse performance perspectives into their organizations. He describes the leadership he provides this way: “Each of the schools has a very capable School Chief so I leave the day to day training management up to them. I focus on three equally important functions...providing the schools with the support and resources they need; coaching my staff of performance consultants who work with the schools; and working with our clients to provide them with the results they really want, on topics as varied as telecommunications, network maintenance, law enforcement and emergency medical services.”

Even in the Coast Guard, with established commitments to performance improvement, line leaders aren’t always on board. Terry put it this way, “We spend quite a bit of time with clients talking with them about performance improvement and the need to make sure training is what they really need. We have been pretty successful at convincing them to pay for analysis but we’ve not been so successful

at getting them to follow through on the non-training pieces of the puzzle. Frankly, they know we'll give them a first class training product and the other stuff is just too hard. Since my training center doesn't have the influence to make the systemic changes needed, we now require the client to designate one of their folks as the project manager. That shifts responsibility for the success of the endeavor from the training provider (us) to the clients themselves. They find it harder to blame the training system if it doesn't work out and are more open to including reps from human resources, operations, etc. in the effort."

Here Terry is demonstrating one of the strategic shifts occurring in our business. While continuing to produce knock-your-socks-off training and support materials, he and his team are working as change agents and redefining and sharing responsibility for performance improvement with the line.

Great Training with a Systems View

Terry's statement about where he derives pleasure in his work is interesting. Note how his focus is on the implications of the effort, in this case, for the ways a job aid helps to get the work done. He said, "We've adopted what we call our Core Purpose. It's a simple statement that our mission is to "Improve performance in the field for technical specialties we serve." What it doesn't say is that we will put on great training or that we will graduate 5000 students each year. My greatest joy is that every one of my staff truly takes that statement to heart and uses our Core Purpose as the litmus test for all that we do. They eagerly search for ways to build skill and knowledge that really have an impact beyond the classroom. For example, they'll build an online job aid for calibrating a piece of equipment that is perfect for use in the field. They'll then design a

training module for their school based on using that job aid instead of the traditional lecture and lab. I guess I get a real charge out of seeing my instructors view themselves as more strategic in the organization and then contribute.”

Technology Contributes and Complicates

When queried about technology and training, Terry said, “I’d say there is intense excitement about technology in two thirds of our staff and intense fear in the other third.” He notes that there are some wonderful benefits, for example, “We’ve recently saved more than 2000 student days a year in just a few courses by using 3-D modeling and animation to get complex electronic concepts across. That’s very real and the peer pressure is on in all my schools for similar results.” At the same time, Bickham is concerned about the tendency to use technology as an information dump, continuing habits associated with one expert presenting to many, the familiar sage-on-the-stage. He said, “The trouble is that some of the schools are focusing on converting classroom lectures to basic PowerPoint. We’re addressing this by attempting to develop our folks to think about the strategies, not just the technologies, to make these folks more comfortable with new software and teaching and interaction strategies, but it will take a while.”

In the Future

Bickham acknowledges his roots in training. Here is the caveat he offers as he encourages training people to retain specializations, “As performance has become in vogue, I’ve seen some people give an almost Judas-like denial of their former lives as training professionals. I think that’s silly. While it’s fine to consider yourself a performance consultant, I believe it is important to specialize in a particular intervention or two. Training management with a true performance

Chapter 1: Weloome to Training

foundation can have huge impact on the organization. If you keep that larger perspective and purpose alive in your team, the opportunities are endless and exciting.”

At the Heart of the Matter

The following slides are designed to help professionals explain and win support for their training, development and performance improvement efforts. The focus here is on encapsulating the business so that others can support and participate.

Slide 1



What is Training?

Training is what the organization provides to its people to help them become more effective humans and employees.

Presenter's Notes: Slide 1

Ask your audience to think about training that has made a difference for them. List a few ways that it contributed to your growth. What made it successful? How could it have been even better?

Slide 2



What training looks like today

- A class at the training center
- When the supervisor coaches
- Use of a web-based checklist to prepare for a performance review
- Review of call-backs with a manager

Presenter's Notes: Slide 2

Note that we're keeping it simple. Use real examples. Where we've spoken about the generic class or web-checklist, fill in real examples from your setting. The important thing here is to give a sense of the richness of things that are going on as part of the training enterprise, and of course, to link those efforts to strategic goals.

Slide 3



Why Train?

- New products, customers, technologies and locations....
- Prepare people to learn independently
- Prepare for the unforeseen
- It matters, resulting in better performance, retention, sales....

Presenter's Notes: Slide 3

Once again, focus on your own setting. What new technology is being rolled out? Who are the new customers and why do sales and service people need information about them? What data do you have about the impact of training on results? Share it here.

Slide 4



Is training sufficient? NO!

- Role of the supervisor
- Importance of clear expectations
- Match with metrics and recognition
- Strong sponsorship
- Matching technology & processes

Presenter's Notes: Slide 4

This is a classic challenge. How do you convince the larger organization to play a part in the performance improvement effort? First, be clear about their role. Keep it simple. Focus on managers and supervisors and how critical they are to the success of any initiative. Then move on to talk about each of the above factors, all of which are best explained by grounding them in a real effort, one that is familiar to executives. Resistance is typical. Meet it with examples of past training efforts (quality, customer service, sexual harassment) unsupported and thus unsuccessful.

Slide 5



Helping trainers develop people

- ✓ Are 'sibling' relationships encouraged?
- ✓ Are they at the table before the emergency?
- ✓ Are you an active sponsor?
- ✓ Are you judging goodness by butts in seats?

Presenter's Notes: Slide 5

Many professionals have not told their leadership how to help them do their jobs in a more strategic way. Do that. It is also important to talk about the shoemaker's children, since there are many training and development units who lag behind in their own development.

Resources

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TABLE 1.1 EXPANDING PURPOSES FOR TRAINING

Training, typically	Training, into the future
Individual growth and development	Individual <i>and</i> organizational growth and development
Skills	Skills, knowledge <i>and</i> perspectives
Know-how	Know-how <i>and</i> know-how-to-learn
Learning	Learning, performance, <i>and</i> strategic results
The right way to do it	The rights <i>ways</i> to do it, including understanding about several possible acceptable ways of approaching the work
Training has immediate impact	Impact is immediate <i>and</i> continues on into the future
Trainees are prepared for the next task <i>and</i> the current job	Immediate implications <i>and</i> as preparation for the unforeseen
Participants learn-by-heart (memorize).	Knowledge bases are key reference
Skills for the work	Work related skills <i>and</i> those with implications for a lifelong career trajectory

TABLE 1.2 EXPANDING APPROACHES TO TRAINING

Training, typically	Training, into the future
Training events, materials and products	Systems, where events and materials are only one aspect
Classroom-based	Convergence of learning and work
Instructor-led	Learner-centered
Simplification and reduction in errors	Authenticity and the desire for engagement with real situations
Instructor responsibility	Expanding learner responsibility
Instructors test students on their new skills and knowledge	Classroom and technology based self-assessments are included
Instructor-led OR self-instructional	Instructor-led AND self-instruction in the same system
Professionals make, revise or purchase training or training services	The organizational role expands, including brokering with vendors and 'siblings' in the organization
Enhanced by technology such as video, audio and self instructional print	Technology is key player, delivering significant aspects of the training and work support
Instructors teach what students need to know by heart; some key materials are provided as documentation and job aids	Professionals gather best practices and perspectives into online knowledge bases and learning communities which engage employees over time
Training experience is a moment in time	Development extends over time and into work, and might commence with a conversation with a supervisor, move the worker to the web for a self assessment, include a class offering, and follow up with online chats for participants and their supervisors

TABLE 1.3:
EXPANDING ROLES OF TRAINING PROFESSIONALS

Conventionally	Now, increasingly, into the future
Developer of individual brainpower	Manager of organizational brainpower
Designer and developer	Developer <i>and</i> purchaser from outsources
Deliverer or coordinator of classes	Less delivery, more focus on organizational readiness and management of knowledge resources
Develops and produces events and products	Creates and nurtures placebound and online environments that continuously suport and develop
Coordinator of short term events and interactions	Broker of systems that start before classes and continue afterwards
Concern about high quality experiences for participants	Focus on the systems that encourage and support performance, learning and strategic results
Meeting needs by delivering from inventory	Performance analysis to customize and tailor
Sharing skills and knowledge	Managing knowledge resources
Focusing on students	Developing programs for supervisors as well as students
Measured by butts in seats and hits on web sites	Measured by contributions to strategic goals and results
Solves problems when they emerge	Anticipates and mitigates

TABLE 1.4: Q&AS

Questions	Suggested answers
<p><i>Why are you writing about training when performance is most important?</i></p>	<p>We are writing about training because training is still at the heart of our business in the view of customers. We still do it. What must change is how we support it, the systems we wrap around it, the partnerships we establish in the organization, and the care we use to rivet training to important opportunities and problems. Indeed, the purpose is performance; training is one portion of the performance effort.</p>
<p><i>Aren't education and training distinct? Haven't you been combining them?</i></p>	<p>Yes, many do consider them distinct, and we have been talking about them as if they are synonymous. It is important to recognize that training has been historically linked to immediate job performance, while education has been associated with longer term experiences that build individual capacity. A training organization that only develops skills for today will need to train and train and train repeatedly. On the other hand, an organization inclined only towards education will swiftly lose support from line supervisors. Both are called out and respected in Table 1.1.</p>
<p><i>What is knowledge management? Is a training professional the same thing as a knowledge manager?</i></p>	<p>The transition of the workforce from brawn-power to brain-power rivets attention on what the people in an organization know and how to collect, stir, store and refresh it. That is the charge of the knowledge manager. This is a growing area of opportunity for training professionals with skills at capturing best practices, representing many</p>

Questions	Suggested answers
	<p>perspectives on success, and nurturing dialogue in an organization.</p>
<p><i>There's a lot of talk about training technologies. Is it happening? Is it making a difference?</i></p>	<p>Technology is definitely finding its way into training and development. Lakewood and ASTD studies agree on that, pointing to a steady rise in technology-based training. The impact is murkier. While many with expertise and stakes in technology and training point to increased learning and reduced costs, independent studies are still needed. One thing is certain; training tomorrow will involve more and better technology than today. Our challenge is to take advantage of the benefits of technologies, while addressing valid concerns about superficiality and failure to persist.</p>
<p><i>If what we care about is performance, why even talk about training?</i></p>	<p>We may "care" about performance, according to ASTD's Bassi, Cheney & Van Buren (1997), but we don't necessarily focus professional energies on it. Rossett & Tobias (1999) found that fewer than 2/3 of professionals conduct analysis prior to selecting a solution and only 18% describe their organizations as boundaryless. Try effecting strategic performance without collaboration across organizational boundaries. It can't be done. Training remains at the core of our business, for good and some not so good reasons. We must take advantage of our current vantage point in order to contribute to performance.</p>

TABLE 1.5: RESOURCES

Time	Resources
<i>"I have an hour"</i>	<p>Tour the ASTD web site at www.astd.org</p> <p>Tour the Training & Development Community Center at http://www.tcm.com/trdev</p>
	<p>Tour the ISPI site at www.ispi.org</p> <p>Tour the Training Supersite at http://www.trainingsupersite.com</p>
	<p>Tour the Masie Center, The Technology and Learning Thinktank at http://www.masie.com/train96.html</p> <p>Read Rossett & Barnett's article in Training magazine, "Designing Under the Influence."</p> <p>Gayeski, D. (1998). Out-of-the-box instructional design. Retrieved May 26, 1999 from the World Wide Web: http://www.astd.org/CMS/templates/template_1.html?articleid=11475</p>
<i>"I have a day"</i>	<p>Tour the Education, Training and Development Resource Center for Business and Industry at http://www.tasl.com/</p> <p>Tour the Training Net at http://www.trainingnet.com</p> <p>Read the rest of this book.</p> <p>Subscribe to the Masie technology and training newsletter at www.masie.com</p>
	<p>Read Billcom Publishing's TRAINING magazine annual census issue published each year in October and November</p> <p>Visit www.ibstpi.org, an organization that has generated instructor, instructional designer and manager competences</p> <p>Read Robert Mager's "What Every Manager Should Know about Training" and "Goal Analysis"</p>

Time	Resources
	<p>Tour Instructional Technology research online http://intro.base.org</p>
<p><i>"I've got a week"</i></p>	<p>Join the American Society for Training and Development, attend a conference, subscribe to <u>Training and Development</u></p> <p>Join International Society for Performance Improvement, attend a conference, subscribe to <u>Performance Improvement</u></p> <p>Consider attending an Influent Technologies (www.influent.com) conference or the annual training conference and training and technology conferences at www.lakewoodpub.com</p> <p>Check out Pac Bell's searchable index of educational Web sites at http://www.kn.pacbell.com/wired/bluewebn/</p> <p>Read the Journal of Interactive Learning Research http://www.aace.org/pubs/jilr/</p> <p>Read Smith, P.L & Ragan, T. J (1999). 2nd edition. Instructional design. Upper Saddle River, NJ: Prentice-Hall.</p>