FROM TRAINING TO ENHANCED WORKPLACE PERFORMANCE

SECOND EDITION

A practical guide for turning training dollars into performance results

Leslie Allan

By the Same Author:

Training Management Maturity Model

Training Evaluation Toolkit

Managing Change in the Workplace

Writing Learning Outcomes

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About the Author

Leslie Allan has been assisting organizations improve their capability for over 20 years. He has contributed in various roles as manager, consultant and trainer within the manufacturing and service industries, both for public and private sector organizations. On the people side, Mr. Allan has set up and managed training functions for leading multinationals. His achievements include reducing online learning costs by 80 percent and increasing employee course completions by 540 percent. Taking a strategic approach to investing training resources also led him to develop a best practice model for training functions.

Mr. Allan's external and internal consulting roles have seen him lead successful projects in strategic planning, workplace communications, and quality and HR information systems. He is also a seasoned instructional designer and trainer, having taught programs in both vocational colleges and industry. Training programs that Mr. Allan has designed and delivered include the full gamut, from technical skills training to management and communication skills, team leadership, financial management and career planning.

On the process side, Mr. Allan has helped companies, small and large, improve their process capability. Managing 15 teams for one multinational manufacturer, he led the continuous improvement initiative, forming, training, coaching and motivating the teams to identify, map and improve their processes. His project management and facilitation skills were utilized in another national conglomerate to lead the design and implementation of a comprehensive document management system and the mapping and reengineering of core processes.

Mr. Allan is a prolific writer on business issues, with many journal and web articles to his credit. He is also the author of five books on employee capability, training and change management. Mr. Allan currently serves as Divisional Council Member for the Australian Institute of Training and Development and is a member of the Australian Institute of Management and the American Society for Quality.

About **BUSINESS** *Performance* Pty Ltd

Established in 2003, Business Performance Pty Ltd provides business and management consulting services globally. The company delivers coaching and consulting services in a range of business areas, from small business, leadership and management, strategic planning and organizational change to employee development and career coaching. All services are provided by highly experienced consultants specializing in their area of expertise.

From its website, Business Performance Pty Ltd also proudly supplies a wide selection of business and management software products designed to make managing organizations easier and more effective. Products featured include tools, templates and guides in the areas of training and employee development, project management, organizational change, career planning, and web development. All products can be purchased and downloaded easily from anywhere in the world from the Business Performance Pty Ltd website at www.businessperform.com.

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1   Introduction

1.1   Training in Today's Organizations

The world is now a much different place to what it was even ten years ago. The opening up of global markets has caused a radical shake up of many organizations. Skilled employees regularly transmigrate across international borders. With current technology, the migration no longer needs be physical. Call centers and back office processing in one country service customers in another. With many countries experiencing decreasing birth rates and extended life expectancies, populations are getting older. There are not enough young people to fill the demands for jobs in the new economy. The emerging economies of Africa, Eastern Europe, Latin America and the Middle East thirst for skills to drive the expanding marketplace. Not for profit organizations are also feeling the pressure from having to source skills from the same limited talent pool.

Organizations are recognizing that identifying current employee potential and skilling them up is often a more effective solution than engaging in the incessant "war for talent". Avoiding the bidding war also saves on the ever increasing salaries needed to attract the best people. At the other end of the spectrum, organizations are also increasingly appreciating the link between investing in the future of their employees and their ongoing viability. Studies into the link between employee engagement and profitability are becoming more and more sophisticated. Investing in employees also helps to stem the flow of skills to the opposition. It is in this context that we find organizations placing greater emphasis on employee training and development.

At the same time, the increasingly competitive environment is forcing a closer scrutiny of organizational expenditures. Fast disappearing are the days when organizations can afford to squander a significant portion of their profit on vague initiatives and ideas. Training departments are more and more asked by the executive to justify their expenditures. Add to this mix the already political nature of budget allocations in any organization and it is little wonder that training managers are becoming increasingly focused on showing bottom-line results.

Many training professionals are taking the same view from a different perspective. These practitioners want to know that the work they do in designing and delivering training programs is making a difference. They want to ensure and somehow verify that their job has a purpose in furthering the organization's aim. Knowing this gives meaning to their own role; a sense that what they do contributes something worthwhile in the bigger scheme.

Writing and offering this book serves these multiple perspectives. This book shows organizations how they can best draw on and develop the skills of their employees in the most cost effective way possible. It also illustrates how investing in employee training can enrich the working life of employees whilst at the same time contributing to real and measurable organizational objectives. Through using the strategies and techniques discussed in this book, I want to give training professionals a sense that they can be in a "people profession" whilst making a real difference to the organizations they serve. Lastly, my purpose here is to provide a means for organizations to measure the impact of training programs in both financial and non-financial terms. This will help inform the decision-makers that allocate expenditures in addition to assisting training managers continuously improve their programs.

1.2   Getting More Impact from Training

How much benefit are organizations getting from their training programs? Larger organizations typically invest more resources per employee into formal training programs. However, smaller organizations usually have less spare funds available for training, and so scrutinize training expenditures more closely. Either way, decision-makers in many organizations are asking how each dollar spent on their training programs contributes to actual performance gains. Researchers vary in their answer to this question, but by and large there is unanimity that the results could do with significant improvement. Some researchers estimate that about 25% of skills taught are in use six months after the completion of training. After one year, they say, about 15% of the skills taught continue to contribute some benefit to the organization. Other researchers put the figure as low as 10%. This waste represents a very sizable proportion of what organizations spend on training. Add to this the waste of potential resulting from employees lacking the initial training to perform their jobs adequately and the costs of omitted and misdirected training are very significant.

The first part of this book (*Sections 2* to *7*) presents an approach for stemming this malaise. I introduce a cohesive set of practical methods designed to help you leverage the power of training for real organizational improvement. I have named this way of training the ***PRACTICE* Approach**. As the name suggests, the central feature of this approach is its emphasis on methods and activities for ensuring that training participants put into practice the knowledge and skills gained during the training program. For without putting the new knowledge and skills into practice, organizations investing in training may as well be pouring their money down the drain.

The approach advocated in this book ties together the principles and practices of effective training design and delivery with the organizational conditions and managerial activities necessary for translating skills into improved performance. The central tenet of this book is that instructional designers, trainers, managers and training participants need to work together to bring about superior workplace performance. Skill acquisition and performance improvement should no longer be the sole preserve of the training specialist. The ***PRACTICE* Approach** identifies the eight key elements contributing to translating training activities to better performance on the job. For each of these elements, managers, designers, trainers and trainees all have an important role to play. This book provides the various tools and techniques required by each of these players to bring the eight elements to life.

The key players will need to collaborate right from the inception of the idea through the planning stage to delivery of the training, and finally beyond the program to workplace application. In fact, much of the research into training effectiveness reveals that the most successful programs are those that are embedded within a well-planned and strategically aligned change or improvement program. In fact, one can tell which programs are most likely to succeed and which most likely to fail by looking at the level of collaboration and planning that went into them. This book will make much of the need to integrate training into the organization's strategic and operational planning and its current organizational initiatives. I conclude the first part of this book by exploring practical ways of forming and strengthening this partnership between trainers, managers, participants and other key stakeholders.

The approach presented here is informed by current research into organizational effectiveness and learning theory. However, you will not find within these pages a lot of theory. You can read about the research behind this approach by referring to the resources cited in the bibliography at the end of the book. The ***PRACTICE* Approach** is also the result of my consulting work. Over the years, I have worked with a variety of organizations in various sectors. The practical methods, tools and templates presented here are the result of this experience.

This book is designed to be a practical resource through and through. As you progress through the book, you will follow the development of three organizations struggling with improving the impact of their training programs. The first scenario concerns the partners of an accounting firm organizing harassment prevention training for their staff. The second scenario involves a manufacturing company implementing training on their new inventory management system. The final example draws on a large auto repair business skilling up self-managing work teams. Each applies the principles and techniques central to the ***PRAC-TICE* Approach** to suit their own circumstances and specific challenges.

Applying the methods to your own organization and training programs is made easier by the plethora of templates, guides and forms included here. Most of these tools are reproduced in the Appendices located at the end of this book. The full Microsoft Word and Microsoft Excel forms and tools are supplied as additions with this book for you to customize to your exact requirements. There are over 20 such additions, so there is a tool or template for almost every purpose in creating high impact training programs.

Whereas the first part of this book presents methods and tools for improving the organizational impact of training, the second part offers a variety of techniques and tools for measuring that impact. The two parts are intertwined, as lessons learned from determining the organizational outcomes resulting from the training are fed back into the training system to bring about improvements in the effectiveness of future programs. In fact, as this book will demonstrate, the act of measurement itself can serve to improve a program's impact.

Training professionals experience a lot of angst when faced with the prospect of measuring and reporting on the efficacy of their program. They may be asked by their manager, requested by the executive or simply feel that if they fail to report this information they will be considered unprofessional or risk losing their status, or even their job. Such misgivings are well placed. Measuring the impact of training on organizational outcomes can be fraught with difficulty, not helped by an abundance of misinformation that surrounds this topic. This situation is further exacerbated by the fact that many training practitioners working in a "people" profession are unversed in business measurement and quantitative techniques. There are also a number of training impact models in currency, further confounding trainers and managers wanting simple but reliable methods of measurement.

The methods and tools presented in *Sections 8* to *14* apply the law of diminishing returns to give you the simplest methods available without sacrificing too much by way of accuracy. The most significant challenge for anyone wanting to determine the impact of a training program is isolating the impact of the program *per se* from the myriad of other influences on the outcomes. A moment's reflection reveals that the increased sales following a sales training program may have been due to a recent advertising campaign, a competitor going into liquidation or the hiring of two new sales personnel. If the result is not wholly due to these factors, then it may be due at least partly. And if so, how much is due to the training program?

Some critics have argued that it makes no sense to try and isolate the impact of training from other factors. And in some cases, they are right. This book provides some simple rules that you can apply to help you determine when isolating the impact of training is a meaningful and worthwhile activity. In this regard, many books on training evaluation present one tool or technique for isolating the impact of training, or at best two such methods. Because no one or two methods will suit all of the different types of training programs being conducted and all of the various organizational circumstances and resources available, I have included here all of the techniques that can be applied without technical expertise or much effort.

In some circumstances, drawing a trend line is the most prudent method. In others, running a control group or matched pairs will give the best results. Where these methods prove too

difficult, expensive or time consuming, using estimates is an effective method. Choosing which method is the best for your circumstance is no easy feat. This book will walk you through the benefits and disbenefits of each method and present easily understandable guidelines for selection. Most importantly, I have included here a plethora of forms, questionnaires and automated worksheets for all of these techniques.

Another question often asked is, "What impact do we want to measure?" This book uses a simple but powerful model for guiding this discussion. The model remains well received after many years and has the added advantage of allowing diagnosis of why a particular program did not deliver the benefits expected. Many trainers gauge trainees' reactions to a program and stop short there. With the tools and techniques presented here, training professionals will be able to measure the impact of their training at these other levels; the extent and depth of learning, the extent of behavior change back on the job and the measurable benefit to the organization.

Once program benefits are isolated from other influences, these benefits can be quantified in non-financial terms, such as amount produced, defects detected and customers satisfied. More and more managers and practitioners want to convert these benefits to financial measures, such as profit, turnover and savings. Such conversion can also prove very challenging for the uninitiated. This book provides some simple techniques and tools for doing just that. With the tools presented here, financial benefits can be calculated as benefit to cost ratio, return on investment, payback period, net present value, or a combination of these. Finally, I discuss how to plan for your evaluation exercise and how best to report the evaluation results. The data collection and reporting templates included are designed to make your life easier whilst allowing you to complete the tasks in a thoroughly professional manner.

1.3 Who Will Benefit from This Book

This book will prove useful for instructional designers, trainers, supervisors, people managers, human resources managers, program managers, project managers and anyone else with an interest in improving the effectiveness of a training program. This book is written with a minimum of technical language so that all of the key players can pick it up and start using the ideas and tools presented.

You may be a seasoned instructional designer, teacher, instructor, trainer or facilitator. Your programs may be well received by trainees and their managers alike. However, other key stakeholders are questioning or wanting more impact on the ground from your programs. People are satisfied with the program, but are sceptical about the benefits and about whether the money invested could be better spent on other initiatives. This book will help you connect your programs into the wider organizational context. It will assist you in getting the other stakeholders to take ownership of the results so that they work with you instead of sitting on the sidelines.

You may be new to training, having just received your qualifications, or, like many, have been thrown into the training role after serving in another position within your company. As well as presenting you with many of the tools you will need for high impact training, this book may help to change your mindset. Some people adopt the training role believing that training is about presenting in front of a group of people. Training is not fundamentally about "putting in a performance", but about "performance in the job". The former approach is "trainer-centric", in which the trainer takes center stage to inform and perhaps entertain. The latter approach is "trainee-centric", in which the participants take center stage. Here, the role of the trainer is to facilitate learning through presenting, coaching, consoling, inspiring and collaborating with trainees. The goal is not to "put on a show", but to help people do their job better or in a different way. This book will help you change your mindset from being simply a presenter to being a performance coach.

The principles and techniques explored in this book apply to every kind of training program. Your organization may buy some or all of its training from external suppliers. The programs may be purchased off-the-shelf or customized. Alternatively, you may design your programs in-house. In all of these situations, this book will assist you in getting more mileage from your training dollar. If you buy in your training programs or engage an external consultant, you will be better prepared by knowing what questions to ask up front. You will also appreciate what your vendor can't do for you; what is outside of their control. You will learn, for example, that your vendor or consultant cannot fix an endemic cultural malaise in your organization or provide your employees with more resources on the job. By recognizing the limits of external interventions, you will be in a better position to make more lasting impacts on your organization's capability.

This book is also not specific to any particular training delivery method or medium. Whether you conduct physical classroom sessions or virtual classrooms, adventure training, problem-based learning, computer-based training or e-learning, the basic principles and methods for results-based training apply. Programs are also of varying size and scope. You may be involved with the design and rollout of enterprise-wide training programs, such as Enterprise Resource Planning (ERP) or Customer Relationship Management (CRM) training. Or you may be involved with more local training initiatives at the department or workgroup level. Examples here are implementing and training autonomous work teams or rolling out a new time tracking system. This guide is relevant to both large and small programs. On the other hand, you may simply be concerned with ensuring that the employee that enrolls in a time management course will actually manage their working hours more effectively back on the

job. The principles, guidelines, checklists and templates presented here will prove to be a valuable resource in all of these situations.

A central theme of this book is that for training initiatives to be truly effective, managers, supervisors, program designers, sponsors and trainers will need to work in partnership towards a common goal. Long gone are the days when these key players could work in isolation in their own organizational silos. Training employees is not like programming automata. It never was. Trainees are real people who have frustrations, prejudices, dreams and priorities – inside of the training room and out. And after the training, they have to go back to real workplaces. In many of these workplaces, trainees won't have enough resources to do the job properly, they will have a "Gestapo" style supervisor or they will worry about making their next rent payment. In some workplaces, they will have every reason to put the training manuals aside and just get on with "business as usual".

Trainers will need to work in concert with human resources managers, line supervisors, program sponsors and executives to ensure that the work environment to which the trainee returns is a fertile ground for "planting" their new skills. This is the challenge for this new "partnership"; to ensure that the training "seed" ripens to become a full fruit-bearing tree. For this reason, this book is for everyone that influences the training participant's work environment, both before and after the training. If you are a trainer, give a copy of this book to the program designers, executives sponsoring your program and the participants' managers. If you are a program sponsor or manager, read it. Everyone who is in charge of managing people in an organization is responsible for making sure that employees learn and use the new skills on the job.

Who will this book not help? This book will not help you if you design, plan or conduct employee development programs for which you are not concerned about demonstrable outcomes. You may conduct leadership development, teambuilding or emotional intelligence programs, or similar, and believe that either measurable outcomes are not needed or cannot be determined. Or the program sponsors and other key stakeholders may not be asking for tangible evidence of such benefits. In these cases, the many good books available on program design will be a better choice for you. Similarly, if you believe that trainees alone are responsible for their learning and for using the skills back on the job, or that trainers train and managers manage workplace performance, then this book is also not for you – unless you are willing to have your existing ideas challenged. This book is unapologetically for people who want to make a difference to their organization's capability and wish to demonstrate to themselves or others that they have made such a difference.

I will finish this introduction on a note about the terminology used in this book. Where I use the term "organization" or "organizational", I refer to an organization or an organizational unit, unless the context makes it clear that I am referring specifically to the whole organization. An organizational unit can be a business unit, region, division, department, team or workgroup. Training programs are designed and delivered for groups of all sizes and compositions. This book is relevant to all of these groups, and so not limited to organization-wide programs.

Where I use the terms "he", "she", "his", "hers", "him" and "her", I refer to people of either gender, unless the context makes it clear that I am referring to one gender exclusively. Similarly, for the sake of convenience, I will often use the terms "they", "their" and "them" to refer to a person of either gender.

I trust that you enjoy reading this book as much as I did in writing it.

Leslie Allan

16 Appendices

16.1 Guide to Appendices

The forms listed and reproduced here are also included as separate customizable Microsoft Word documents packaged with this book. Some packaged resources are not included in the Appendices, and these are detailed in *Section 16.2*. These additional resources include Microsoft Excel worksheets and Adobe Portable Document Format (PDF) files.

Appendix A	The *PRACTICE* Approach	One-page summary of the **PRACTICE Approach** suitable for display. It outlines underpinning principles and high-impact training transfer activities. PRACTICEApproach.pdf (not customizable)
Appendix B	Certificate of Completion	Certificate awarded to training program participants who complete successfully the requirements of the program. Certificate.doc A mail merge version of the certificate (CertificateMailMerge.doc) and the associated data source file (CertificateData.doc) are included as additional resources.
Appendix C	Personal Action Plan Form	Form for use by trainers to encourage training program participants to document an action plan for implementing knowledge and skills learned during the program back on the job. PersonalActionPlanForm.doc
Appendix D	Training and Development Plan Form	Form for use by supervisors and managers to document with each employee an agreed employee training and development plan. DevelopmentPlanForm.doc
Appendix E	Program Communication Plan Form	Proforma plan for communicating with stakeholders about various aspects of the training program throughout the life of the program. ProgramCommunicationPlan.doc
Appendix F	Stakeholder Partnership Plan Form	Proforma plan for conducting a training program stakeholder analysis, including identifying key stakeholders and their interests and creating partnering strategies. StakeholderPartnershipPlan.doc

Appendix G	Training Evaluation Data Collection Plan	Proforma plan for collecting the necessary data required for each level of a comprehensive training program evaluation. DataCollectionPlan.doc
Appendix H	Evaluation Report Communication Plan	Proforma plan for communicating training program evaluation results to the various program stakeholders during all phases of the evaluation. EvaluationReportCommunicationPlan.doc
Appendix I	Transfer of Training Checklist – Organizational Unit Program	Form for use by project managers and training professionals to plan and track training transfer activities where a number of training program participants have been selected as part of an organizational unit change or improvement program. TrainingTransferChecklist-OrgUnit.doc
Appendix J	Transfer of Training Checklist – Individual Employee Training	Form for use by supervisors, managers and training professionals to plan and track training transfer activities where an individual employee has been selected for training. TrainingTransferChecklist-Individual.doc
Appendix K	Training Participant Feedback Form	Survey form for use by trainers to collect and document training program participant reactions to a training program. TrainingParticipantFeedbackForm.doc A spreadsheet for entering and analyzing survey results is included as an additional resource. (TrainingParticipantFeedbackSpreadsheet.xls)
Appendix L	Skill Assessment Form – Individual	Form for use by trainers and assessors to assess whether a training program participant met the program exit requirements. SkillAssessmentForm-Individual.doc A spreadsheet for recording assessment results for a group of training program participants is included as an additional resource. (SkillAssessmentForm-Group.xls)
Appendix M	Training Transfer Survey Form	Survey form for use by training professionals with training program participants to evaluate the extent to which participants are using the skills learned during the program back in their workplaces. TrainingTransferSurveyForm.doc

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Appendix N	Training Transfer Interview Form	Interview form for use by training professionals with participants' supervisors and managers to evaluate the extent to which training program participants are using the skills learned during the program back in their workplaces.
		TrainingTransferInterviewForm.doc
Appendix O	Organizational Results Survey Form	Survey form for use by training professionals with selected stakeholders to gather estimates of the relative non-monetary contribution of the training program to organizational results.
		OrganizationalResultsSurveyForm.doc
		A spreadsheet for entering and analyzing survey results is included as an additional resource. (Level4-EvaluationWorksheet.xls)
Appendix P	Training ROI Survey Form	Survey form for use by training professionals with select stakeholders to gather estimates of the relative monetary contribution of the training program to organizational results.
		TrainingROISurveyForm.doc
		A spreadsheet for entering and analyzing survey results is included as an additional resource. (TrainingROIWorksheet.xls)
Appendix Q	Training Program Evaluation Report	Guidance notes and proforma formal report documenting training program evaluation methods and results.
		TrainingProgramEvalReportTemplate.doc

16.2   Additional Resources

The following resources are included with this book as separately packaged files. They are not reproduced in the Appendices. To use these resources, you will need the following software installed on your computer system:

Resource 1 requires the Adobe Acrobat Portable Document Format (PDF) reader.

Resources 2 and *3* require Microsoft Word.

Resources 4 to *7* require Microsoft Excel.

Resource 1	Performance Diagnostic Flow Chart	Flow chart and guide for diagnosing employee performance problems and for identifying when training is the appropriate solution. EmployeePerformanceDiagnostic.pdf
Resource 2	Certificate of Completion (Mail Merge)	Mail merge version of the *Certificate of Completion*. CertificateMailMerge.doc
Resource 3	Certificate of Completion Data Source	Data source file for use with the mail merge version of the *Certificate of Completion*. CertificateData.doc
Resource 4	Training Participant Feedback Spreadsheet	Spreadsheet for entering, storing, analyzing and reporting the results from a survey using the *Training Participant Feedback Form*. TrainingParticipantFeedbackSpreadsheet.xls
Resource 5	Skill Assessment Form – Group	Spreadsheet for entering, storing and reporting aggregate assessment results for a group of training program participants. SkillAssessmentForm-Group.xls
Resource 6	Level 4 Evaluation Worksheet	Spreadsheet for entering and analyzing the results from a survey using the *Organizational Results Survey Form*. Level4-EvaluationWorksheet.xls
Resource 7	Training ROI Worksheet	Spreadsheet for entering and analyzing the results from a survey using the *Training ROI Survey Form*. TrainingROIWorksheet.xls

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