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.
# TABLE OF CONTENTS

1 Introduction .................................................................................................................... 1
   1.1 Training in Today’s Organizations ...................................................................... 1
   1.2 Getting More Impact from Training ..................................................................... 2
   1.3 Who Will Benefit from This Book ........................................................................ 5

2 Laying the Foundations ................................................................................................. 7

3 The Importance of the Workplace Environment ............................................................ 12

4 Two Views of Training .................................................................................................. 17

5 The \textit{PRACTICE} Approach ..................................................................................... 20
   5.1 What Practice Means ....................................................................................... 20
   5.2 Procedures ...................................................................................................... 23
      5.2.1 Procedural Document Types .................................................................... 23
      5.2.2 Harassment Prevention Example .............................................................. 24
      5.2.3 Procedure Writing Tips .......................................................................... 25
      5.2.4 Inventory Management System Example ............................................... 27
      5.2.5 Lessons for Ensuring Training Impact ..................................................... 27
      5.2.6 Working in Teams Example .................................................................... 29
   5.3 Roles and Responsibilities .................................................................................... 30
      5.3.1 Thinking about Change ............................................................................. 30
      5.3.2 Role Description Format ........................................................................... 30
      5.3.3 Task, Key Result Area and Role Analysis ................................................ 31
      5.3.4 Clarifying Performance Expectations ....................................................... 32
      5.3.5 Harassment Prevention Example .............................................................. 33
      5.3.6 Working in Teams Example .................................................................... 34
   5.4 Aids on the Job .................................................................................................. 35
      5.4.1 From Training Program to the Job ............................................................... 35
      5.4.2 Types of On-The-Job Aids ....................................................................... 36
      5.4.3 Examples of Application .......................................................................... 41
   5.5 Coaching ............................................................................................................ 43
      5.5.1 Planning for Coaching .............................................................................. 43
      5.5.2 The Coaching Role ................................................................................... 44
      5.5.3 Essential Coaching Skills ......................................................................... 47
      5.5.4 Examples of Application .......................................................................... 49
5.6 Targets ............................................................................................................51
  5.6.1 Identifying Workplace Objectives..............................................................51
  5.6.2 Examples of Application ...........................................................................54
  5.6.3 Focusing Employees on the Targets ........................................................55
  5.6.4 Defining Employee Behaviors and Learning Outcomes ......................57
  5.6.5 Constructing an Impact Map ....................................................................58
  5.6.6 Defining Learning Outcomes for Individuals ........................................60
5.7 Incentives ........................................................................................................62
  5.7.1 Internal and External Motivation ..............................................................62
  5.7.2 Using External Motivators to Maximize Skill Application ....................63
  5.7.3 Principles Underpinning an Effective Incentive Scheme .....................65
  5.7.4 Types of External Rewards ....................................................................67
  5.7.5 Driving Counterproductive Behaviors ....................................................69
  5.7.6 Examples of Application .......................................................................70
5.8 Communication ................................................................................................73
  5.8.1 Formulating a Program Communication Plan .......................................73
  5.8.2 Communicating Effectively with Stakeholders .....................................76
5.9 Engagement ....................................................................................................78
  5.9.1 Types of Engagement ...........................................................................78
  5.9.2 Before Training .....................................................................................79
  5.9.3 During Training .....................................................................................81
  5.9.4 After Training .......................................................................................88
6 Integrating the Elements .....................................................................................94
  6.1 Taking a Project Management Approach ....................................................94
  6.2 Managing Small Programs .........................................................................95
  6.3 Managing Larger Programs .......................................................................100
7 The Training Partnership .....................................................................................103
  7.1 Identifying Key Stakeholders .....................................................................103
  7.2 Creating and Nurturing Partnerships ..........................................................106
8 Evaluating Training Programs ..........................................................................112
9 Measuring Reaction ............................................................................................115
  9.1 Gathering Reaction Data ...........................................................................115
  9.2 Analyzing and Reporting Results ..............................................................117
10 Measuring Learning ...........................................................................................119
  10.1 Trainee Assessment or Program Evaluation? ...........................................119
  10.2 Selecting an Assessment Method ..............................................................120
  10.3 Conducting an Assessment .....................................................................124
10.4 Selecting the Assessor and Location.............................................................126
10.5 Analyzing and Reporting Results.................................................................127

11 Measuring Behavior ............................................................................................129
11.1 Setting the Scene ..........................................................................................129
11.2 Selecting Data Sources and Gathering Data ..................................................130
11.3 Selecting the Timing and the Evaluator .........................................................138
11.4 Analyzing and Reporting Results .................................................................139

12 Measuring Results ............................................................................................141
12.1 Why Measure Results? ..................................................................................141
12.2 Isolating the Effects of Training ....................................................................142
12.3 Trend Line Method ........................................................................................147
12.4 Control Group Method ................................................................................154
12.5 Matched Pairs Method ................................................................................160
12.6 Selecting a Method .......................................................................................163
   12.6.1 Method Selection Table ...................................................................163
   12.6.2 Isolating Psychological Factors .......................................................163
   12.6.3 Measuring Intangibles .....................................................................164
12.7 Estimating the Impact of Training ...............................................................166
12.8 When Not to Isolate the Impact of Training ..................................................169

13 Measuring Return on Investment (ROI) ............................................................174
13.1 What Is ROI and Why Calculate ROI? .........................................................174
13.2 Converting Benefits to Monetary Amounts ..................................................175
13.3 Determining the Benefit Period .....................................................................177
13.4 Calculating Training Program Costs .............................................................179
13.5 Is Training Really an Investment? ..................................................................181
13.6 Other Methods for Calculating Financial Return ........................................183
   13.6.1 Benefit to Cost Ratio ......................................................................183
   13.6.2 Payback Period .............................................................................183
   13.6.3 Net Present Value .........................................................................184
13.7 Measuring Financial Returns in Context .....................................................186

14 Program Evaluation Planning and Reporting ..................................................188
14.1 Planning for Evaluation ................................................................................188
14.2 Reporting Evaluation Results ........................................................................191

15 In Conclusion ....................................................................................................194
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>Appendices</td>
</tr>
<tr>
<td>16.1</td>
<td>Guide to Appendices</td>
</tr>
<tr>
<td>16.2</td>
<td>Additional Resources</td>
</tr>
<tr>
<td>16.3</td>
<td>Appendix A – The <em>PRACTICE</em> Approach</td>
</tr>
<tr>
<td>16.4</td>
<td>Appendix B – Certificate of Completion</td>
</tr>
<tr>
<td>16.5</td>
<td>Appendix C – Personal Action Plan Form</td>
</tr>
<tr>
<td>16.6</td>
<td>Appendix D – Training and Development Plan Form</td>
</tr>
<tr>
<td>16.7</td>
<td>Appendix E – Program Communication Plan Form</td>
</tr>
<tr>
<td>16.8</td>
<td>Appendix F – Stakeholder Partnership Plan Form</td>
</tr>
<tr>
<td>16.9</td>
<td>Appendix G – Training Evaluation Data Collection Plan</td>
</tr>
<tr>
<td>16.10</td>
<td>Appendix H – Evaluation Report Communication Plan</td>
</tr>
<tr>
<td>16.11</td>
<td>Appendix I – Transfer of Training Checklist – Organizational Unit Program</td>
</tr>
<tr>
<td>16.12</td>
<td>Appendix J – Transfer of Training Checklist – Individual Employee Training</td>
</tr>
<tr>
<td>16.13</td>
<td>Appendix K – Training Participant Feedback Form</td>
</tr>
<tr>
<td>16.14</td>
<td>Appendix L – Skill Assessment Form – Individual</td>
</tr>
<tr>
<td>16.15</td>
<td>Appendix M – Training Transfer Survey Form</td>
</tr>
<tr>
<td>16.16</td>
<td>Appendix N – Training Transfer Interview Form</td>
</tr>
<tr>
<td>16.17</td>
<td>Appendix O – Organizational Results Survey Form</td>
</tr>
<tr>
<td>16.18</td>
<td>Appendix P – Training ROI Survey Form</td>
</tr>
<tr>
<td>16.19</td>
<td>Appendix Q – Training Program Evaluation Report</td>
</tr>
<tr>
<td>17</td>
<td>Bibliography</td>
</tr>
<tr>
<td>18</td>
<td>Index</td>
</tr>
</tbody>
</table>
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 PRAC-TICE 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 PRAC-TICE 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 PRAC-TICE 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.

<table>
<thead>
<tr>
<th>Appendix</th>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appendix A</td>
<td>The PRACTICE Approach</td>
<td>One-page summary of the PRACTICE Approach suitable for display. It outlines underpinning principles and high-impact training transfer activities. PRACTICEApproach.pdf (not customizable)</td>
</tr>
<tr>
<td>Appendix B</td>
<td>Certificate of Completion</td>
<td>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.</td>
</tr>
<tr>
<td>Appendix C</td>
<td>Personal Action Plan Form</td>
<td>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</td>
</tr>
<tr>
<td>Appendix D</td>
<td>Training and Development Plan Form</td>
<td>Form for use by supervisors and managers to document with each employee an agreed employee training and development plan. DevelopmentPlanForm.doc</td>
</tr>
<tr>
<td>Appendix E</td>
<td>Program Communication Plan Form</td>
<td>Proforma plan for communicating with stakeholders about various aspects of the training program throughout the life of the program. ProgramCommunicationPlan.doc</td>
</tr>
<tr>
<td>Appendix F</td>
<td>Stakeholder Partnership Plan Form</td>
<td>Proforma plan for conducting a training program stakeholder analysis, including identifying key stakeholders and their interests and creating partnering strategies. StakeholderPartnershipPlan.doc</td>
</tr>
<tr>
<td>Appendix</td>
<td>Description</td>
<td>Details</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td>G</td>
<td>Training Evaluation Data Collection Plan</td>
<td>Proforma plan for collecting the necessary data required for each level of a comprehensive training program evaluation. DataCollectionPlan.doc</td>
</tr>
<tr>
<td>H</td>
<td>Evaluation Report Communication Plan</td>
<td>Proforma plan for communicating training program evaluation results to the various program stakeholders during all phases of the evaluation. EvaluationReportCommunicationPlan.doc</td>
</tr>
<tr>
<td>I</td>
<td>Transfer of Training Checklist – Organizational Unit Program</td>
<td>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</td>
</tr>
<tr>
<td>J</td>
<td>Transfer of Training Checklist – Individual Employee Training</td>
<td>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</td>
</tr>
<tr>
<td>K</td>
<td>Training Participant Feedback Form</td>
<td>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)</td>
</tr>
<tr>
<td>L</td>
<td>Skill Assessment Form – Individual</td>
<td>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)</td>
</tr>
<tr>
<td>M</td>
<td>Training Transfer Survey Form</td>
<td>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</td>
</tr>
<tr>
<td>Appendix N</td>
<td>Training Transfer Interview Form</td>
<td>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.</td>
</tr>
<tr>
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</tr>
<tr>
<td>Appendix O</td>
<td>Organizational Results Survey Form</td>
<td>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.</td>
</tr>
<tr>
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<td></td>
<td>A spreadsheet for entering and analyzing survey results is included as an additional resource.</td>
</tr>
<tr>
<td>Appendix P</td>
<td>Training ROI Survey Form</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A spreadsheet for entering and analyzing survey results is included as an additional resource.</td>
</tr>
</tbody>
</table>
### 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 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 |
18  Index

3
360-degree survey  See multi-rater survey

7
7 X 7 rule  110

8
80/20 rule  143

A
accounting periods  180
achievement culture  120
acronyms  20, 25, 26, 37, 38
action learning  85, 172
ADDIE Model  99, 101
cost per phase  179
described  95
phases  96
affection, effects of  163
affective domain  121, 122, 123
after training  21, 28, 32, 56, 61, 62, 63, 73, 79, 132
behavior change  4, 14, 19, 20, 21, 47, 58, 60, 63, 92, 113, 120, 129, 130, 132, 135, 136, 139, 140, 141
behavioral descriptors  65
behavioral outcomes  54, 57, 83, 121, 128
behaviors, counterproductive  47, 64, 69, 94
bell curve  See normal distribution
benchmarking databases  176
benefit period  175, 177
benefit to cost ratio  183
Bloom, Benjamin  44, 121
Bloom’s taxonomy  44, 122, 126
body language  48, 107, 109
bonus payment  64, 65, 66, 67, 68, 69, 70, 71
break-even point  182
brown paper bag sessions  46

B
balanced scorecard  52, 143
bank interest  184
BCR  See benefit to cost ratio
before training  21, 28, 32, 56, 61, 62, 63, 73, 79, 132
behavior change  4, 14, 19, 20, 21, 47, 58, 60, 63, 92, 113, 120, 129, 130, 132, 135, 136, 139, 140, 141
behavioral descriptors  65
behavioral outcomes  54, 57, 83, 121, 128
behaviors, counterproductive  47, 64, 69, 94
bell curve  See normal distribution
benchmarking databases  176
benefit period  175, 177
benefit to cost ratio  183
Bloom, Benjamin  44, 121
Bloom’s taxonomy  44, 122, 126
body language  48, 107, 109
bonus payment  64, 65, 66, 67, 68, 69, 70, 71
break-even point  182
brown paper bag sessions  46

C
calculators  39
capital purchases  180
case study  85, 121, 123, 124, 125, 126
causal chain  18, 19, 112, 113, 119, 155
causal factors  18, 145, 152, 153, 159, 169
Certificate of Completion  69, 127
certificates  67, 68, 69, 71, 88, 127
chance variations  See random variation
change program  14, 51, 55, 73, 81, 100, 102, 128, 170, 173, 186, 187, 191
charts  8, 39, 56, 71, 110, 117, 132, 133, 139, 148, 151, 158, 191, 193
checklists  6, 36, 41, 75, 91, 98, 99
class rules  See ground rules
closeness of fit  148
coaching  16, 19, 21, 43, 92, 97, 125, 136, 138, 172, 180, 186
definition  49
guidelines  47
planning for  43
role  44
skills  47
From Training to Enhanced Workplace Performance

 coefficient of determination 148, 149
cognitive domain 121, 122, 123
communicating
direct reports 56
evaluation plan 114, 129
in coaching 48
stakeholders 76
targets 56
communication 22, 73, 94
e-mail 74, 76, 88, 109, 192
modes 74, 88, 192
plan 73, 75, 114, 118, 128, 139, 140, 190, 192
recommendations 76
skills 107
two-way 76, 81, 91, 106, 109
Communities of Practice 46
comparing training delivery 170, 187
comparing training programs 170
competencies 44, 60, 65
competency-based training 121
compliance training 55
confidence level, estimates 168
confidentiality
agreement 137
direct reports 137
participants 49, 128, 132, 193
control group method 145, 154, 160, 161, 162, 163, 164, 169, 173
applicability 159
control factors 154
ethics 154, 159
procedure 155
pros and cons 146
selecting members 155, 158
conversion data 176
converting benefits 4, 175, 186
CoP See Communities of Practice
cost benefit ratio 186
costs See training program costs
counterproductive behaviors See behaviors, counterproductive
criterion-referenced 121
customers
  internal and external 134, 137
cyclic trend 151

c data collection plan
See Training Evaluation Data Collection Plan
defined processes 15
delivery modes 7, 10, 81
demonstrations 11, 123, 125
demotivators 66, 67, 81
depreciation cost 180
design phase 18, 43, 97, 189
development phase 97, 136, 190
development plan 81, 90, 180
diagnostic checkpoint 113, 119, 129, 136, 141
diagrams 35, 37, 38, 39, 110
discretionary effort 78
distance learning 88
distribution curve 121
document types 24
  standard format 25
documentation tips 26
drills 85
during training 21, 35, 40, 41, 81

E
economic inflation 184
e-learning 5, 17, 85, 88, 187
Electronic Performance Support Systems 40
employee attrition, cost of 176
employee behavior 14, 16, 57, 58, 60, 64, 120, 121, 129
employee disengagement 64, 78
employee engagement 1, 22, 45, 73, 78, 79, 90, 93, 165
Employee Performance Diagnostic Tool 8
employee productivity 37, 39, 40, 45, 69, 78, 147, 154
employee recognition 65, 67, 88
EPSS See Electronic Performance Support Systems
error proofing See mistake proofing
error range, estimates 168
estimating financial benefits 176
  estimate limits 178
estimating impacts 4, 166, 172, 173
  applicability 166
  correction factor 168
  credibility 166
  estimate limits 168
  procedure 166
evaluate phase 98
evaluation model 112, 113, 119, 129, 174
evaluation plan 113, 130, 134, 138, 169, 188, 189, 190
evaluation report 118, 139, 165, 168, 191
Evaluation Report Communication Plan

14, 118, 128, 139, 140, 185, 190, 192, 193
expectancy, effects of 163
external customer 134, 137, 139
defined 137
external motivators 62, 63, 65, 78
external rewards
examples 67

F
feedback
coaching 48
employee 71, 91
participant 83, 87, 124, 127, 136, 165
financial benefits 4, 174, 186
financial estimates
collecting 176
financial measures 186
applicability 186
financial rewards See monetary rewards
five rights of training 7
flow chart 25
on-the-job 37
poor performance 9
focus group 131, 133, 137, 167
defined 133
meeting structure 133
method 135
Force Field diagram 12
formal report 191
formative assessments 124
forms 39, 41
forums 46, 50, 85, 176
four level evaluation model See evaluation model
front-line employees 28, 56, 66, 92
front-line manager, importance 16, 56, 92

G
goal setting 15, 43, 47, 55, 57, 82, 90, 91
benefits 51
goals
individual 60
intangible 54
organizational 59, 126, 143, 145, 167, 189
ground rules 42, 87
group work 87, 123

H
harassment prevention training 24, 33, 41, 49, 55, 70
Hawthorne effect 163
help online See online help
histogram 158, 161

I
Impact Map 55, 58, 66
implement phase 97, 190
improvement program See change program
incentive scheme 64, 69, 100, 152, 169, 170, 186
principles 65
incentives 15, 19, 22, 94, 101, 132
examples 68, 70
goal achievement or behaviors 65
individual or team 64
internal and external 62
monetary or non-monetary 64
individual training 60
inflation See economic inflation
inhibiting factors 13
innate ability 18
instructional design 5, 10, 18, 33, 55, 58, 74, 105, 119, 173, 179, 187
intangible benefits 164, 182
interest rate 184
internal customer 134
defined 137
internal motivation 63, 72
internal motivators 62
internal supplier 137
International Coach Federation 49
interpersonal interaction 50, 85, 92, 108, 110, 123, 128, 130
interview method 131, 133, 135, 137, 139
isolating effects 3, 142, 153, 159, 160, 162, 163, 174
methods 145
validity 167, 169, 171, 186
isolating psychological factors 163

J
job aids See on-the-job aids
job descriptions See role descriptions
just in time 132

K
key result areas 30, 31, 32
Kirkpatrick, Donald 112
From Training to Enhanced Workplace Performance

Kirkpatrick’s model  See evaluation model

L
lagging indicators  52, 54, 55, 70, 101
leading indicators  52, 54, 55, 70, 71, 101
learner disengagement  83, 84
learner engagement  22, 78, 79, 82, 84, 86, 88, 101
learning domains  44, 121, 122
learning environment  11, 86
learning goals  119, 127
Learning Management System  88, 126, 180
learning objectives  See learning outcomes
learning outcomes  32, 33, 57, 58, 60, 83, 90, 116, 126, 130, 132
learning space  116
learning styles  10, 47
Level 1 evaluation  See measuring reaction
Level 1 evaluation survey form  See participant feedback form
Level 2 evaluation  See measuring learning
Level 3 evaluation  See measuring behavior
Level 4 evaluation  See measuring results
Level 4 Evaluation Worksheet  147, 158, 175, 191
Level 5 evaluation  174
Level4-EvaluationWorksheet.xls  156, 160, 175, 176
line of sight  66

M
mail merge  69, 127
management style  6, 50, 155, 156, 160
management support styles  92
manager as coach  45
managing programs
large  100
small  95
matched pairs method  145, 160, 163, 164, 173
applicability  162
benefits  160
missing data  161
procedure  160
pros and cons  146
selecting members  161
timing  162
mean value  160
measure effectiveness
benefits  113
cost of  186
planning  188
reasons  191
measuring behavior  129
data sources  130, 135
display results  132
methods  130
metrics  139
timing  138
which programs  140
measuring intangibles  54, 164
measuring learning  119
benefits  119
conducting assessment  124
methods  120
metrics  127
purposes  119
which programs  128
measuring reaction  115
analyzing  117
data collection  115
feedback form  116
methods  115
reporting  118
which programs  117
measuring results  141
estimating impacts  166
isolating effects  142
methods  145, 163
psychological factors  163
timing  151
mediating factors  18, 112
meetings  110
costs  180
face-to-face  74, 76, 109, 192, 193
focus group  33, 167
ground rules  42
Impact Map  58
post-course debriefing  89
pre-course briefing  80
purpose  109
stakeholder  107
tips  110
with direct reports  56
memory prompt  36, 37, 38
mentoring  13, 16, 44
methodological errors
isolating impacts  171, 173
MICE Principle  116
mistake proofing  41
mnemonics  38, 42
moderators, training impact 125, 172
  defined 172
  external 172
monetary rewards 22, 64, 67, 68, 71
monetary value, benefits 175
motivation
  employee 18, 22, 43, 56, 64, 69, 160, 166
  internal and external 62, 78
  learner 13, 15, 41, 47, 62, 76, 81, 118, 122, 123, 125, 172
  manager 166
  stakeholder 106, 107, 108
multiple perspectives 85
multi-rater assessments 123
multi-rater survey 54, 71, 136, 165, 186
multivariate analysis 152

N
naïve view of training 17, 58
negative reinforcement 63
net present value 178, 184, 186
new role 30, 32, 34, 92
non-monetary benefits 169, 186
non-monetary rewards 64, 66, 67, 68
non-training influences 151, 154, 155, 160, 162, 164, 166, 173, 175
  sources 142
non-verbal messages 86, 108, 109
normal distribution 158, 161
norm-referenced 121
NPV See net present value

O
objectives See targets
observation, direct 123, 124, 125, 130
observer effect 62, 123
online help 40
online learning See e-learning
on-the-job aids 16, 21, 35, 172
  examples 41
  types of 36
  when to use 35
on-the-job coaching See coaching
operational procedures
  use in training 172
opportunity to apply 10, 16, 19, 43, 88, 129, 132, 172
organizational benefits 95, 141, 142, 164, 166, 173, 174, 175
organizational change See change
program
organizational enablers See moderators
organizational goals See goals, organizational
organizational moderators See moderators
organizational objectives 52, 54, 57, 58, 59, 82, 126, 143, 145, 167, 188, 232
Organizational Results Survey Form 167, 168, 176
organizational silos 6, 173
organizational unit 6, 100, 145, 155
organizational values 13, 69, 89
OrganizationalResultsSurveyForm.doc 165, 167
organizations as systems 48, 170, 171, 186

P
participant feedback form 115, 116, 165
  analyzing and reporting 117
participant satisfaction 113, 117
payback period 177, 183, 186
performance appraisal 10, 33, 37, 60, 66, 70, 135, 172
performance diagnosis 7
performance expectations 21, 30, 32, 34
performance feedback 13, 15, 19, 85, 172, 180, 186
performance indicators 31, 52
performance management 56, 63, 65, 91, 98
performance results 112, 136
  communicating 74
  displaying 56
  measuring 90, 148, 151, 158
  reporting 98
performance standard 8, 23, 32, 33, 57, 127
Personal Action Plan 61, 83, 91
Phillips, Jack 174
physical environment 11, 116
pilot program 97, 154, 179, 180, 191
pilot study 177
placebo effect 163
planning evaluation See evaluation plan
poka yoke See mistake proofing
policy 21
  definition 24
  example 24
  format 25
poor performance 8
poor quality, cost of 176
position descriptions See role
descriptions
positive reinforcement 63
From Training to Enhanced Workplace Performance

post-course debriefing  88, 90
meeting structure  89
post-implementation reviews  12, 33
post-tests  126, 164
post-training  See after training
post-training influences  151, 152, 153, 163
PRACTICE Approach
poster  22
small programs  99
summary  20
pre-course briefing  79, 90
meeting structure  80
prerequisites, program  18, 125
presentations  36, 39, 110
pre-tests  126, 164
pre-training  See before training
pre-training trend line  147, 148
privacy policy  161
pro rata costs  180
problem-based learning  5, 10, 85, 88, 172
procedural documents
use in training  27
procedures  15, 21, 43, 79, 92, 94, 100, 101
definition  24
examples  24, 27, 29
format  25
on-the-job  37, 41
purpose  23
writing tips  25
process improvement training  28, 41, 64
process map  25
definition  24
on-the-job  37
SIPOC Analysis  26
specification sheet  26
production line thinking  17
professional associations  46, 82
Program Communication Plan  75
program coordinator  74, 75, 88, 94, 101
program costs  See training program costs
program design phases  57, 58
program introduction  84
program kick-off  76
program manager  5, 101, 139, 156, 177
program objectives  16, 96, 97, 186, 188, 189
program resources  105
program sponsor  6, 74, 83, 95, 101, 104, 105, 110, 177, 182, 187, 192
project  22, 45, 73, 174, 186
communications  74
defined  94
definition  95
deliverables  95
governance  100
initiation  95
phases  96, 179, 180
planning  95
scope  95
stakeholders  105, 140, 188
structure  See project, governance
project management benefits  94
project management training  28, 64, 125, 128, 177
project manager  5, 28, 95, 101, 139
psychomotor domain  121, 122, 123
Pygmalion effect  163
Q
questioning techniques  48, 86, 108
R
R² value  See coefficient of determination
random variation  147, 148, 149, 151, 157, 162
ready reckoners  39
real-life examples  83, 172
reinforcement  15, 33, 63, 87, 88, 91, 172
remedial training  119, 125, 128
reminder cards  37, 41
resistance to change  63, 109, 129, 131
response rate, survey  115, 132
return on investment  4, 142, 173, 183, 184, 186, 187
calculating  181
formula  174
minimum acceptable  182
return on investment analysis
applicability  169, 171
benefits  174
procedure  175
return on investment period  See benefit period
rewards and recognition  63, 88, 127
right environment  7, 11
right learning  7, 10
right method  7, 10
right time  7, 10, 81
right trainees  7, 81
ROI  See return on investment
role analysis  31
role congruity  15
role descriptions  21, 30, 33, 60, 94, 152
format  30
From Training to Enhanced Workplace Performance

| role model | 92 |
| role-plays | 83, 85, 87, 123, 124, 125, 126 |
| roles and responsibilities | 21, 30 |
| clarify | 34 |
| examples | 31, 33, 34 |

S

| salary costs | 175, 176, 179 |
| scattergun approach | 10, 81 |
| seasonal trend | 151 |
| self-assessment | 124, 126 |
| self-managed teams | See working in teams training |
| self-motivation | 62, 72 |
| Senge, Peter | 103, 170 |
| separate training impact | See isolating effects |
| simulations | 84, 123, 124, 125 |
| Skill Assessment Form – Group | 125 |
| Skill Assessment Form – Individual | 36, 124 |
| Skill Assessment Forms | 191 |
| skill atrophy | 16, 132, 138, 151 |
| skill statement | 132 |
| SkillAssessmentForm-Group.xls | 125 |
| SkillAssessmentForm-Individual.doc | 124 |
| skills assessment | 96, 124 |
| skills practice | 2, 10, 16, 18, 28, 35, 43, 84, 141 |
| SMART goals | 51, 65 |
| smorgasbord approach | 10, 58 |
| social learning | 82, 85 |
| soft measures | 54, 164 |
| soft targets | See targets, soft |
| sophisticated view of training | 18, 58, 112 |
| special interest groups | 46 |
| Stakeholder Partnership Plan | 105, 111 |
| stakeholders | 73 |
| analysis | 105, 189 |
| communication needs | 74, 192 |
| identifying | 103 |
| influence | 105, 107 |
| list | 74, 192 |
| partnership | 106, 188 |
| resistance | 107 |
| standard cost | 176 |
| standard deviation | 117, 127, 160 |
| statistical significance | 157, 158, 160, 161 |
| Steering Committee | 100, 101 |
| subject matter expert | 45, 83, 166 |
| summative assessments | 124 |

supervisor support | 16, 172 |
| support systems | 40, 155, 156, 172, 186 |
| surveys | 360-degree | See multi-rater survey |
| customer | 138 |
| employee | 66, 73 |
| impact estimates | 167, 168 |
| intangible benefits | 165 |
| Level 3 evaluation | 131, 139 |
| multi-rater | See multi-rater survey |
| organizational results | 167 |
| participant | 113, 115 |
| post-implementation review | 12, 33 |
| soft measures | 54 |
| training transfer | 131, 134, 191 |
| system training | 27, 31, 42, 49, 57, 70, 100 |
| systems thinking | 48, 170, 171, 186 |

T

| targets | 21, 51, 99, 143, 167 |
| benefits | 51 |
| communicating | 56, 73 |
| examples | 54 |
| soft | 54 |
| task analysis | 31, 32, 57 |
| team building | See working in teams training |
| team incentives | 64 |
| teamwork | 65, 69, 165 |
| templates | 2, 4, 75, 83, 95, 99, 113, 124, 132, 146, 147, 163, 190, 191 |
| on-the-job aid | 16, 35, 38, 172 |
| tests | automated 126 |
| methods | 123 |
| reliability | 121, 123, 128 |
| validity | 121, 126, 128 |
| time value of money | 184 |
| timelines, types | 138 |
| timesavings | 176 |
| trainee-centric | 5 |
| trainer-centric | 5 |
| training aids | 21, 35 |
| Training and Development Plan | 81, 90 |
| training as telling | 18 |
| training budget | 191 |
| Training Evaluation Data Collection Plan | 113, 115, 128, 139, 165, 190, 191 |
| training impact | 3, 27, 155, 169, 173, 186 |
| training investment | 181 |
| training needs analysis | 33, 41, 76, 96, 99, 113, 130, 180, 187, 188 |

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Business Performance Pty Ltd
Training Participant Feedback Spreadsheet  191
training partnership  6, 103, 105, 173
training program costs  175, 179
categorizing  179
representative costs  179
training program design  7, 10, 18, 33, 44, 57, 74, 87, 95, 98, 125, 128, 173, 187, 189
Training Program Evaluation Report  185, 191
Training Program Manager  101
training project design  179
Training Project Plan  190
Training Projects Template Pack  95
training purpose  34, 82, 94, 136
training relevance  83
training ROI  173
Training ROI Survey Form  176, 178
Training ROI Worksheet  39, 168, 175, 178, 179, 180, 183, 184, 185, 191
training transfer  7, 14, 15, 20, 21, 29, 30, 33, 34, 62, 63, 76, 79, 90, 91, 129, 130, 132, 140
factors  132, 133, 136
problem of  13
training transfer environment  116
Training Transfer Interview Forms  191
training transfer partnership See training partnership
Training Transfer Survey Form  131, 191
training transfer tasks  99
TrainingParticipantFeedbackSpreadsheet.xls  117
TrainingROIWorksheet.xls  177
TrainingTransferInterviewForm.doc  135
transfer of learning See training transfer
Transfer of Training Checklist – Individual Employee Training  99
Transfer of Training Checklist – Organizational Unit Program  75, 99
Transfer of Training Checklists  91
trend line chart  148, 151
trend line method  145, 147, 162, 163, 164
applicability  153
extrapolation  150
isolating post-training influences  151
procedure  147
pros and cons  146
trend line types  148
trust  45, 48, 87, 107, 108, 131, 161, 162, 163
U
underpinning attitudes  14, 58, 120
underpinning knowledge  14, 58, 120, 123, 124
unit costs  180
V
values See organizational values
venue costs, calculating  180
W
war for talent  1
waste  2, 8, 10, 51, 81, 92, 117, 119, 187
wikis  46
work instruction
definition  24
format  25
on-the-job  37
work records  131, 135
working in teams training  29, 34, 42, 50, 55, 59, 71, 100
workplace assessors  126
workplace assignments  123, 124, 125
workplace climate  13, 116
workplace environment  6, 11, 12, 13, 15, 19, 20, 35, 83, 116
workplace incentives See incentives
written tests  123