LESSON 13

TRAINING DEPARTMENT

Hi Friends,

In previous few lessons you have understood the procedure followed for Training and Development.

After reading this lesson you will be able to plan and organize Training department in any organization wherever you will go for work.

Before understanding what will make a effective training department let us first understand role and activities done by HRD and training specialist department.

ROLE AND ACTIVITIES OF HRD AND TRAINING SPECIALIST

HRD is based on the faith in the inherent potential in every human which can be , manifested by giving right direction and orientation. At the same time human resource is unpredictable resource which has unlimited potential. These two statements gently hint that the organisational efficiency can be improved by optimising this resource as it is the only resource which can be adjusted and modified to meet the challenging technological and socio-economic environment.

This recognition of emphasis on human resource development has created a need for appraisal of present competence future demand and maintenance of resources for long term benefits.

HRD process maximise the use of human resource by way of optimising competence of available human resource, improving the competence for future challenges and utilising unemployed resource HRD, thus performs the role of personnel management as well as training and Development department and it therefore, needs to be studied, analysed minutely and accurately before deciding the real roles and activity of department

 The roles and activities of HRD will mostly depend on the HRD mechanism being utilised, the HRD needs of the organisation and the facilities, opportunities provided

Thus the role of HRD starts from the analysis of organisational objectives/goals, in par with characteristics of available resources and desired specifications manpower planning recruitment, placement, appraisal reward, punishments and maintenance of resource is one aspect of HRD accountability, where as. organisational climate and opportunity are another.

ROLE AND ACTIVITIES OF HRD DEPTT

Accordingly the main roles of HRD can be listed as

1. Human resource planning
2. Human resource accounting
3. Human resource allocation and role planning Human resource training and development Human resource maintenance
4. Climate development of HRD

T & D DEPARTMENT

The growth of organization depends on:

1. Strategic decisions taken by management and
2. Implementation of these decisions by employees.

The training and development activity is a vital link to facilitate the implementation process by imparting the required training to improve the competence of the employees & to effectively implement the management decisions.

Well trained people can be somewhat effective without well prepared strategic plans or land organizational culture but without strategic knowledge and skill every thing may collapse. Similarly good relations alone can always do good. A truety competitive edge comes from the people who know what they are supposed to do and how exactly that is to be done. T & D helps the people to learn and develop this capability to bring dynamism in the organization.

Managing a Small Training Department

Making the Most of Your Resources

Today's organizations are expecting people to do more with less. Training departments are no exception. In fact, one fourth of all training departments in the United States consist of only one trainer. With small businesses on the rise, there are likely to be even more small training departments in the future. How can a training staff of only one to three people – with a broad range of responsibilities-- ensure that it makes a significant contribution to its organization? This chapter explores strategies that trainers in small departments have used successfully by. Readers will learn keys to working with internal subject matter experts through a train-the-trainer process, as well as keys to working with external consultants and other external resources.

Successful strategies of small training departments are as varied as the individuals involved. Much more so than in large departments, trainers in small departments have a chance to place their unique stamp on an organization. The cases in this book illustrate the variety of approaches small departments use to ensure a big impact. The following key strategies are essential to the small training organization's success:

. Determining priority training needs
. Establishing your credibility and building a strong base of support for your efforts
. Determining the best resource strategy for using internal and external resources

. Maintaining your resilience and a positive attitude

This chapter briefly explores these strategies, which have been used successfully by the case authors and by other trainers in small departments. In addition, it will provide detailed guidance about establishing an effective "train-the-trainer" process for internal resources and selecting and working with external resources to expand your staff's capacity and capability.

Determining Priority Training Needs
A thorough training needs assessment, identifying specific training needs that if met or unmet would impact the organization most, is the foundation for a successful small training department. In doing a needs assessment, it is essential to use a variety of methods, both formal and informal, to gain a clear, complete picture. The cases in this book illustrate the range of methods for conducting a needs assessment. Strategies may include using paper and pencil written surveys, interviewing employees and managers, analyzing problems encountered, or doing research related to the problem or issue. A critical strategy in assessing needs and implementing performance-based training is conducting a thorough job and task analysis of performance requirements.

See Gettle's Monsanto case for an excellent introduction to developing performance-based training. Companies that are pursuing ISO quality certification can identify training needs by creating job profiles and training plans relating to ISO certification. For more information on ISO certification and how it relates to training needs, see Gettle's chapter on Monsanto; Balling's chapter on Collagen; Maxwell and Jost's chapter on Nortel; and Monnin's chapter on Strategies for the 90s.

Another helpful approach to assessing needs and clarifying priorities is to create a training advisory board. The chapters by Arnold on Navistar, Taylor on LWCC, and McCoy on UNUM provide insights into how advisory boards can be help set your direction.

Other approaches to needs assessment are more informal. For example, personal intuition based on your experience working in the business to identify needs or training strategies is valuable. The cases on American Honda, Nortel, and Logitech all illustrate how the authors used their experience in the company to help them understand training needs. Listening to your internal customers also can help identify problems that might have training implications. Teaching or facilitating training allows the "lone trainer" to get a pulse of the organization and learn first hand about the issues facing employees. Tuning into the recommendations of employees who attend outside training programs provides clues about potential high-impact training interventions. Nancy Nunziati discovered a training program that ultimately helped to move Logitech's culture to one of increased accountability because she listened to employees who had attended a time management program and given it rave reviews,. (See Nunziati's Logitech case.)

In many instances, a small organization may not have the internal resources needed for a detailed needs assessment that can identify the best way for training to support the

business objectives. Linda Taylor's chapter on LWCC is an excellent example of using a consultant, who already had the ear of the company president, to conduct a training needs assessment. Taylor shows that as a result of documenting needs, she was able to document the need and gain four additional training staff members. Katie O'Neill at Rock-Tenn and Millar Farewell of American Honda also relied on outside consultants to help them clarify a business need and determine the best approach to solving a training problem.

A key part of conducting a needs assessment is determining priorities because it will be important to focus training resources where they can do the most good. First, it is essential to examine business data that indicates the severity of problems or highlights potential opportunities and their potential impact on the business. Farewell's case on Honda is a good example of how to collect data to determine the impact of electrical trouble shooting skills on service to motorcycle owners.

A second aspect of clarifying priorities is to determine problems where training can actually have an impact and to identify all the solutions needed to change performance. Sometimes the best solution is not a training program, but training along with other interventions -- such as increasing the staff or providing appropriate incentives to perform in the desired way. Training often needs to be accompanied by other follow-up actions to change employee behavior. See McCoy's case on UNUM to learn how call monitoring by supervisors following telephone skills training can lead to improved customer relations.

A third part of identifying priorities is clarifying the priorities and expectations of senior sponsors who pay for training and champion its value. Assessing the receptivity of the organization's senior management to training is essential in determining whether or not training can have an impact. Monnin's chapter illustrates why it is so important to understand the real expectations of an organization's senior management--management's lack of commitment to training ultimately led to their eliminating the position of training director. Monnin was able to provide useful services to her previous employer as an outsourced director of training once she understood their real expectations. Furthermore, she learned to identify better customers for her services--companies where training could have a more significant impact because they had senior managers who recognized the requirements for meaningful training and were willing to support training more actively. Training advisory boards, which include key senior sponsors, or interviews with senior managers can be very helpful in determining senior management's priorities. For example, after reviewing company data, UNUM's training department was not sure whether to focus the initial leadership development efforts on current or aspiring managers as the primary target audience. After meeting with the senior sponsorship group, however, it became clear that current executives and people managers were the most critical audience.

Katie O'Neill's chapter on Rock-Tenn provides helpful insights in how she worked with senior management to clarify their priorities. For additional information on conducting a needs assessment, readers may refer to Allen (1990); Kaufman et al. (1993); McCoy (1993); Phillips et al. (1995); Zemke and Kramlinger (1989).

Establishing Your Credibility and Building Support for Training
Building buy-in or ownership for your strategy is essential. The first step in building support is having a business perspective—being able to think like a business person, understanding the dynamics and performance indicators of your organization's business, speaking the language of your company's business, and showing how training and other performance interventions are critical to your businesses' success. A well planned and executed needs assessment is essential in developing this business perspective.

At first, unless you have had line experience in the industry or your company, you may have a steep learning curve and may need to immerse yourself in company documents, reports and industry publications to help gain a clear understanding of your organization's business. A key component of business understanding is talking to people throughout the organization and asking the right kinds of questions. All the cases illustrate the importance of knowing the business. Buisman's case on Norway Savings Bank, for example, shows how the HRD manager learned about the business by being an active member of several critical bank committees.

An equally important step is planning a well-thought-out evaluation strategy so you can demonstrate the value of training and how training contributes to the business. There are some excellent resources to help you understand training evaluation. (See for example, Phillips and Holton, 1995.) In some cases, the business will want to see a training activity report showing the numbers of people who have been trained (as in LWCC), while in other cases, they will want to see more bottom-line data. Nourishing partnerships with critical players who need to support training or who are the target audience for training will create support for your training approach. For example, sponsors may or may not provide the budget needed to develop and deliver training; and managers may or may not allow their employees time to participate in training or take care to reinforce and reward the use of newly-learned skills and behavior on the job. For people to champion and support training they need to believe in its value. Mike Gettle's Monsanto case describes in detail his approach to building relationships at all levels throughout the Monsanto plant in Muscatine, Iowa. Because the technicians were essential to both program development as well as implementation, Mike took a bottoms-up approach to building support. Another good example of building ownership for training is Raquel Arnold's creation of a broad-based training advisory group, the "Progressive Education Council," at Navistar's Springfield Plant. This advisory group, which consisted of representatives of union and management, validated needs and even solved training related problems, such as improving the effectiveness of the Interactive Learning Center. At Rock-Tenn, Katie O'Neill did such a good job of creating officer involvement that they wanted to create their own vision of management development, rather than one proposed by an external consultant.

Becoming an expert at managing expectations and being clear about requirements for success are essential parts of maintaining credibility in a small training department. Peter Block's classic book, *Flawless Consulting* (1981) provides excellent guidance on the critical skill of contracting. It helps you to distinguish between what is good business that

can succeed and make a contribution and what is bad business that is doomed to failure. In setting expectations or "contracting" with your training customers, it is essential that you be clear with people who request training about what you can and cannot do for them, about whether or not training is the right solution to their problem, and about what they need to do to supplement any training intervention with needed business actions to ensure that training has an impact.

Training alone will rarely improve performance. Frequently, it will be necessary to ensure that clear standards, appropriate tools and job aids, measures of performance and rewards and incentives are in place to encourage people to use the skills, knowledge and behaviors learned in training. Gettle's case on Monsanto illustrates well how to ensure that training is integrated with on-the-job performance by using job aids and job procedures as the training tools. Rogovin's case on Kidder Peabody provides a wonderful example about the limits of ethics training in changing behavior when there are far too many incentives for people to behave unethically. Refer to Robinson and Robinson's (1996) *Performance Consulting: Moving Beyond Training* to help you in analyzing the business situation to ensure all the needed solutions in addition to training are applied to address any business problem.

Determining the Best Resource Strategy
One thing is for sure—to be successful in a small training department, you can not do everything yourself. Finding and making the best use of resources that are not directly under your control is a critical competency. You will need to take advantage of internal resources as well as external resources. Internal resources include subject-matter-experts (the real workers), other Human Resource professionals, and other internal suppliers who can help you with everything from assessing needs, determining priorities, selecting vendors, designing and developing materials, borrowing training materials, delivering training, marketing training, providing follow-up coaching and reinforcement to arranging for training logistics, such as facilities or required technology to use alternative delivery.

Randy Maxwell and Karen Jost's case on Nortel is an excellent illustration of using internal partners to expand the technological capabilities of a training unit. While you may or may not be charged for using the services of employees in your organization, there is definitely a cost to using internal resources—lost production time while people are working on activities that are not part of their primary work accountabilities. You can use external resources for many or all of the same activities listed above, however, you normally have to pay an explicit fee for outside resources. How do you decide whether to use inside or outside resources? Several factors are important to consider in making the decision to use internal or external resources: time, budget, need for involvement, required expertise, need for outside perspective, resource availability, track record of success, and skepticism about work done by outsiders ("the not-invented-here-syndrome.") Often it is best to use a combination of internal and external resources in developing and instructing training programs. (See Table 1 to help you make your resource decisions.) The case studies in this book all provide examples of how to make the most effective use of your resources. The following sections describe in more detail

how to work with internal resources (and train nontrainers to train) and how to work with external consultants..

—Making Resource Choices

Use Internal Resources When
. You have severe budget constraints
. You have time to guide subject-matterexperts,
develop and test materials.
. You need specific expertise found only inside your organization.
. Qualified credible resources are available and committed to the program.
. You want to build sponsorship and ownership through involvement.
. You organization can produce high quality materials quickly and inexpensively.
. The organization tends to mistrust programs "not invented here."

Use External Resources When

. Budget is available.
. You have little time to develop a program or materials.
. The expertise required is found only outside of your organization.
. Outside resources will have more credibility as authorities on the subject.
. You need a fresh, detached, objective outside perspective.
. You lack the capacity to produce high quality or technologically sophisticated materials required.
. A relevant proven, tested, credible program is readily available.
I

Most training managers think about their budgets the same way they think about going to the dentist-you've got to do it, but it's no fun and you want it to be over fast. But budget you must or you may lose face-and your funding for future training programs. They key to successful budget management is (a) understanding what senior management expects from you regarding training expenses; and (b) tracking your budget so you can produce information they need.

1. What numbers do I need to track? Most numbers people will want to know what you have projected in terms of spending for the month and how closely you've kept to that plan. Even if you don't control your training budget now, demonstrating that you understand budgeting requirements may win you control in the future, McCoy points out.

Be prepared to translate your budget categories into those used by your company's finance department. It's also important to build a good relationship with your cohorts in the finance department so that they'll help you develop budget numbers that senior management wants and expects.

2. When do I need to produce reports? Some companies will want you to produce spending reports on a monthly or semi-monthly basis. Find out if and when you'll be expected to budget for the current year, next year, and further out. Does senior management want monthly, quarterly, semi-annual and annual expense projections? What about when you've over-or under budget? (Don't let this happen, *MTD* advises. It's crazy, but if you spend less you'll get less next year).

3. What information should you include in your reports? If spending for training programs varies from your projections, do you need to explain the variance in terms of the bottom line or in terms of specific budget categories? These might include: salaries and related expenses; computer and data processing expenses; travel and entertainment expenses; charge-backs for training, and so on.

Even if you're not required to report this detail to senior management, you'll want to know how your department is performing in each of these categories, McCoy notes.

4. How much budget "slippage" is okay? If you're regularly running under budget, you may give your bosses the impression that you are short on finance savvy, McCoy warns. They may mistakenly conclude that you're unable to forecast when you really need to produce training programs, or that you're intentionally asking for more than you need, or that you're falling short in providing the programs you promised, all of which are impressions you don't want to make.

5. When will your budget be under scrutiny? Simply staying at or slightly under budget isn't enough, McCoy says. Some budget slippage is expected, say at the first of the year when there might be a delay in payment of bills.

As the year unfolds, however, you'll be expected to stay within your training budget or rework it to more accurately reflect increased demand for training and other programs. Since it's senior management's job to track your organization's overall economic performance, they need to be able to project with some accuracy how income and expenses will play out over the year.

"When you are under your budget plan," McCoy explains, "senior management wants to know whether this reflects 'real savings' or inaccurate prediction of expense timing. When you are over your budget plan, senior management wants to know if you can get back on track by saving on other expenses."

Tracking your training budget

Once you have the answers to these five questions, you can create a tracking system that will produce the answers senior management wants. You can use something as simple as an Excel spreadsheet for this. In it, you will record your monthly budget projections and actual expenses. You can set up a simple formula to calculate variance from your budget plan on a monthly, quarterly, and year-to-date basis. (See Table for McCoy's sample budget tracking report). Each month you will simply update your actual expenses.

It's also helpful to keep a record of expenses for each training program you offer. This would include expenditures for consultants, materials, training facilities and equipment, food, travel, and of course, charge-backs to specific departments if you have that kind of arrangement in your organization. Tracking these expenses allows you to measure how accurately you were able to forecast expenses.

Caution: Do this on an ongoing basis, even if you feel pressured to do training, not run numbers. McCoy learned the hard way how difficult it is to unravel program expenses after the fact.

How did you do?

It's important to measure how well you manage your training budget. Here are some effective criteria:

- *Did you accomplish your training objectives to senior management's satisfaction?* Even in an expense-controlled environment you are expected to produce results, McCoy notes. Be careful that you do not cut back on expenses so much that you jeopardize the value of your training department.

- *Were your budget forecasts accurate and timely?* Make sure that your monthly and quarterly forecasts are accurate and that you trend expenses within an acceptable limit. When you review your budget tracking reports, did you expect to see the numbers or did they often surprise you?

- *Did you manage expenses well?* Remember to negotiate the best possible prices from consultants and vendors. Try to make your budget come in on or close to your plan. If senior management asks you to cut back, make sure you limit spending wisely. If you exceed your budget, be ready with good business reasons why you overspent. Also warn management in advance that you expect to be over your budget.

- *How did you handle problem resolution?* This is where good working relationships with finance are important-so you can prevent problems and follow up quickly to resolve any problems that do occur.

Internal Resources: A Train the Trainer Strategy

With a small training department and a large customer base, you can train a critical mass of people in time to meet business needs by training people who are not in the training department to deliver your programs. These "trainers" may be other Human Resource professionals, line managers, regular employees, or trainers who are dedicated to specific lines of business or functions. The cases by Gettle on Monsanto, Balling on Collagen, O'Neill on Rock-Tenn, Rogovin on Kidder Peabody, and McCoy on UNUM are all good examples of using non-trainers to train.

Benefits in Training Non-Trainers to Train.
There are many advantages to developing the training skills of others outside your department. First, increasing resources who can deliver training allows you to reach more people faster. Second, resources who are close to the business have the credibility that comes with business expertise, and they can tailor the training material to real-life situations and deliver the training so that it meets the specific needs of that business. If the target audience works on different shifts from the training department, utilizing people who work on the shift to deliver the training meets a critical logistical need. In addition, people have an increased sense of ownership of training that is taught by one of their people versus someone from "an ivory tower." Furthermore, training employees with subject-matter-expertise to deliver programs means that you don't have to be an expert in everything. Mike Gettle'scase of the Monsanto Muscatine Plant is an excellent example of increasing effectiveness and ownership of training and overcoming logistical challenges of various work shifts by using technicians in the plant to deliver on-the-job training (OJT). Another excellent example of using a train-the-trainer strategy with an executive population is Carolyn Balling's case where she used VPs to introduce ISO certification to all Collagen employees. Using the VPs as trainers ensured ownership, enhanced credibility, and helped achieve an aggressive implementation schedule.

An additional benefit of training others to train is that the newly developed trainers get to learn new skills. Developing training and facilitation skills can be a tremendous opportunity for non-trainers. One of the best ways to learn about a subject is to teach someone else -- people usually deepen their expertise in topics that they teach. As the UNUM case shows, the manager of UNUM's 1-800 Phone Center learned to be a master trainer of Communico's *Magic of Customer Relations* telephone skills program, and as a result she significantly sharpened her ability to satisfy customers as well as her ability to coach others on their phone skills. Also, improved facilitation and presentation skills can help improve people's ability to lead and influence others outside of training situations.

Challenges in Training Non-Trainers to Train. On the other hand, there are some major challenges to training people outside of the training department to become effective trainers. First, gaining organizational support for others to do training can be a challenge in itself. Non-trainers have other priorities besides training—their priority is to make products or provide support services for these products. It takes time for non trainers to learn new skills and then apply those skills in training situations. It may be difficult to

persuade non-trainers to take on additional job responsibilities, especially in downsizing situations when people are already overloaded with the work of others whose jobs have been cut.

Second, it is difficult to assure the quality and effectiveness of programs that are taught by people who are not professional trainers. How do you go about identifying people who are willing to teach others and are likely to be effective trainers? In general, line managers have not learned to teach. To those who have never done it, training often looks deceptively easy. People may underestimate the required preparation, and consequently may not become sufficiently familiar with the training material or take enough time to practice to ensure an effective delivery. Also, subject-matter-experts may know so much that they fall into the trap of lecturing and answering all the questions themselves rather than acting as facilitators who draw on the expertise of the group.

Finally, getting administrative support for decentralized programs can be a big challenge. When training is offered by another area, the business unit may need to provide administrative support as well as instructors for the programs. Administrative assistants who are not in a training department are usually unfamiliar with the trials, demands, nuances, and detailed follow up required to ensure that training programs run smoothly. It takes time as well as specific knowledge to provide smooth logistical support to programs.

You need to train the administrative support people as well as the trainers.

Finding the Right People to Be Your Trainers.

So, how do you go about finding people who would be successful trainers? First, you need to be clear about the criteria for an effective trainer for a specific program. While your specific requirements will vary somewhat, there are some standard criteria for selecting trainers. A critical requirement is knowing enough about a subject to have credibility with your target audience. For example, you want to make sure that anyone you choose to teach leadership skills is perceived to be an effective leader and that anyone who teachers customer service is known for their skill with customers and their customer-orientation. Often you can ask the business sponsor or the Human Resource representative from a particular business to name the credible experts. Sometimes you can identify these people based on your own observations in and out of the classroom. In the classroom, look for people who demonstrate solid program understanding in training exercises and who show excellent presentation skills when they volunteer to share information or act as a spokesperson for a group after a break-out session activity. Stay attuned to the quality of information people share with you when you conduct a needs assessment interview or speak with them in a casual phone conversation.

Another important requirement is the trainer's enthusiasm about the subject and their desire to teach others about it. Are they willing to put the time and effort into learning how to teach a program about a particular subject? Often people will let you know that they would be interested in teaching a subject.

Keys to a Successful Train-the-Trainer Process.

Making trainers out of non trainers (subject-matter-experts or SMEs) is not easy. There are, however, a number of steps that can ensure that employees and managers who learn

to teach your programs succeed in delivering effective training. First, it is essential that you have a selection process and criteria to help you choose the right people who have the credibility, talent, and interest in teaching a particular subject. Businesses are often reluctant to part with their real subject-matter-experts and may want you to be content with a "warm body" as a trainer versus the person who would do the best job. You'll need to convince managers that in the long run, having a qualified SME teach an effective program has a more positive impact on the business than having an unqualified person provide poorly delivered training, which ultimately leads to errors, ineffective business processes and costly rework.

Next, it is important to provide anyone who teaches training with the right tools and learning to ensure they succeed. An effective train-the-trainer process for SMEs might include the following steps:

1. Clarify the expectations of the training certification process with the SME and the SME's managers. Let SMEs know that it takes time, effort, skill, and practice to become an effective trainer. Let them know that not everyone participating in the certification process may succeed in being "certified as a trainer."

2. Ensure that the SME is exposed to the program prior to teaching it. It is helpful to require that the SME attend the program as a participant in order to understand the content, flow, learning dynamics and pitfalls of the program. This may not always be possible if the SME needs to teach the pilot program, however, the SME may learn about the program if they can play a significant role in program design.

3. Provide a clear, user-friendly instructor's manual or leader's guide that explains the learning objectives, key learning points, training materials, and training activities for all content. In some cases you can use job aids and job procedures if trainers are providing OJT.

4. Provide a train-the-trainer workshop that teaches the appropriate content and facilitation skills. Keys to a successful workshop include creating a safe and supportive learning environment; helping people to assess their own skill levels as trainers; providing many opportunities to practice and improve by videotaping practice segments and providing constructive feedback and improvement ideas.

5. Observe new trainers and provide coaching. One way to do this is to require new trainers to teach programs with an experienced co-trainer or co-facilitator who can provide on-the-spot coaching and assistance. Tracking the program evaluations to identify areas where new trainers need to improve is another method.

6. Create a certified trainer network that allows line trainers and SMEs to share ideas about what works and doesn't work in delivering training. Be sure to follow up with trainers to help them solve any problems they encounter.

7. Reward and recognize the contributions of SMEs who contribute to training either as designers or instructors.

Working Effectively with Outside Resources
There are many resources outside of your organization who might help you with training. Outside resources could include consultants and vendors, graduate students seeking an internship in HRD, high school or undergraduate students who participate in work-study programs, and temporary help. You can obtain excellent services from students wishing to learn HRD in action as part of various study programs. At UNUM, we recently used a

USM graduate student in HRD who wanted some real life company experience to develop a self-study writing skills module as part of an employee certification program—we could have never made the deadline or kept the budget without additional free help. Raquel Arnold of Navistar has used graduate students on several occasions to help with needs assessment and program development.

How can you find outside resources who can help? Keeping a network with other trainers and HR professionals within your company and other organizations is a help ful strategy. You can ask your colleagues for referrals for competent external resources. Joining the national American Society for Training and Development (ASTD1) and the local ASTD chapter can provide you with useful contacts. You may find consultants by attending national or local conferences. Frequently, training conferences will include expositions of vendors, who could be future resources for you. ASTD publishes an consultant directory, and also maintains an on-line service, ASTD On-Line, which can serve as another source for consultants. Once you've joined any professional training organization or attended a training conference, you will be added to a myriad of mailing lists. Take time to review the catalogues, fliers and "junk mail" that you receive because they may include precisely the resource you will need at a later time. Finally, the internet may be a possible source of consultants.

If you have the budget, and you know external consultants who have the credibility and skills to get the job done, consultants can be a good way to deliver training. Perhaps you can score a quick win with an off-the-shelf program. These programs can be helpful in meeting generic skills, such as communicating effectively, managing time, preventing sexual harassment, managing others, etc. Nunziati's case on Logitech is a good example of using a generic time management program. Sometimes vendors offer special deals on their programs and allow some employees to attend their programs for free or a nominal fee in order to build interest.

Maintaining Resilience and a Positive Attitude
Having a positive attitude is essential to your success—your attitude affects your ability to think of possibilities, to influence others, to build key partnerships inside and outside your organization. It also is a source of sustained momentum and energy you will need to overcome obstacles and the foundation for your mental and physical well-being. A key challenge in a small training department is facing all the demands and keeping up with the constant work pressures without being overwhelmed. Sometimes it is easier to notice all that you cannot do rather than what you can do. Given the size of the responsibilities you face, you can feel like "**a tiny speck of dust in the universe**" to quote the words of Ed Asner on the Mary Tyler Moore show. This pitfall of feeling of small, inconsequential and powerless can be particularly compelling if you have previously worked in a very large HRD department, or if your department has been downsized significantly.

A key part of resilience is taking care of yourself so that you have the energy to -work long hours. Carolyn Balling has written a book, *Fit to Train,* and offers seminars at various conferences that offer advice on eating and exercise habits that help maintain your physical and emotional health. Balling's case on Collagen shares some of her tips for maintaining her positive outlook. Keeping a sense of humor is key. In addition, finding time to do activities that restore you can go a long way in regenerating your spirit.

Anne Monnin, for example, makes sure that she allows time to play tennis or ski, depending on the season. I find that working in my garden and watching or participating in sports is very restorative for me. If you travel as part of your job, take advantage of opportunities to learn about different cultures and take in local sights when you travel on business. For those of you who are open to it, polarity therapy can be a wonderful way to relax yourself, tap into your creativity, and focus your energy. This therapy involves a mixture of light massage, working with crystals and a variety of relaxation techniques. For more information on polarity therapy, write to the American Polarity Therapy Association.

(An Extract from Article)

When you're in a small department, it is easy to get into a reactive mode in which you respond to urgent demands for your services and stay in a constant state of crisis.

Being in constant crisis can be very exhausting and discouraging—it can lead you to feel that you aren't making a meaningful contribution because you stay focused on short-term requests versus important longer-term priorities that are not so urgent. Having a longer-term focus not only helps the organization you serve, it also helps you stay true to your values and priorities. Staying focused on what you want to accomplish and how you can make a difference versus dwelling on what you cannot do makes a big difference in your attitude. On a personal note, my entire outlook on my job at Chase changed when an executive in our business in Brazil told me that he valued my advice and that I would be much more effective if I focused on what I could do rather than what I could not do. This attitude shift not only helped increase my effectiveness as a consultant, it did a lot to bring my spirits and confidence as well.

Books and workshops can be wonderful ways to refocus yourself on important goals and to restore needed balance in your life. I've found that reading Robert Fritz, founder of DMA and author of *The Path of Least Resistance: Learning to Become the Creative Force in Your Own Life* (Fritz, 1989), and attending his workshops to be helpful in realizing my aspirations. You can learn to take actions and put supports in place that make it much easier for you to succeed. Fritz teaches the importance of visualizing your important goals on a daily basis, and taking actions that make it easier for you to focus on your goals. For example, I was having a hard time working on my previous book partly because I felt tired and my environment distracted me from writing-- my computer was set up at an uncomfortable desk and chair next to my very comfortable bed. Not unlike many writers who experience "writer's block," I wasted time berating myself for procrastinating.

After taking one of Fritz' workshops, I took mental and physical steps to help redirect myself back to my goal. First, I visualized the book being completed and how pleased I would be: visualizing success made me feel happy and energized. Next I bought an ergonomic chair and desk and learned to take breaks to restore my energy. After those changes and learning to respect my own natural working cycle, I was able to work for much longer periods. This same principle helped me in my business work as well.

Stephen Covey's books, audio tapes, and workshops also encourage people to make choices to respond to what's really important in their lives versus what is merely most urgent (see for example, Covey, 1990). Learning by listening to audio tapes is a great

way to change your perspective or learn new skills while traveling. Personally, I was very inspired by listening to Covey's audio tape on *First Things First* as I drove to work in the morning. It was a much better way to start the day than listening to the news disasters of the day and the latest country hits.

Participating in learning activities of all types helps to build your skills and give you a new perspective. Stephanie Burns, author of *Artistry in Training* (Burns,), advocates the value of learning a completely different skill unrelated to your job, such as learning how to play a musical instrument or how to sky dive, to keep your mind sharp, to build your own flexibility, and to enhance your awareness of what's involved in the learning process itself.

One excellent way to build your skills, increase your personal network with others who have common interests, and refresh your enthusiasm is to speak at various training conferences, present courses or workshops at a local university, and author books and articles. Since writing *Managing a Small HRD Department* (McCoy), I have spoken about that topic and other topics at local and national ASTD conferences, at an International Quality and Productivity Conference and at a local conference, "Women in Management," sponsored by the University of Southern Maine in Portland. In addition, I teach Managing Training and Development at the University of Southern Maine's School of Continuing Education. It's very rewarding for me to share what I know and to learn from others in the HRD profession. Connecting with people outside of my current organization keeps me plugged into organizational and business trends, and also gives me a broader context for my work. Publishing can be a wonderful way to share knowledge and learn at the same time. I've enjoyed interviewing and working with other trainers as part of writing and editing books. Finally, I've found it enlightening to work with publishing companies as an HRD expert who reviews potential manuscripts.

Summary

In conclusion, there are several strategies to keep in mind so you can thrive in a small training department. First, you need to ensure that you have identified the priority training needs and that you focus on these priorities. Second, you need to take steps to establish your credibility and build a strong base of support for your efforts by getting to know the business and creating partnerships with key players inside your organization. Third, have a resource strategy, that takes advantage of all potential resources inside and outside of your organization. This will greatly expand your capacity and effectiveness in providing training support. Finally, you will get much more done in your work life and feel much more satisfied and healthy if you find ways to keep your outlook balanced and positive, and your activities focused on your important goals.

ARTICLES

How to work with consultants. Important steps in selecting a consultant to develop a program include the following actions:

1. Locate potential resources and create a candidate list. Having more than one consultant provides options, a better chance to get the most cost-effective solution, the potential to gain ideas from more than one source, and a back-up strategy in case your first choice falls through for any reason.

2. Create a vendor selection committee. Sharing the responsibility for selecting the right vendor with the business not only improves your selection, but it also creates a sense of business ownership for the training.

3. Create selection criteria to help you choose the most appropriate consultant. Criteria might include expertise, familiarity with your industry, proven track record, capacity of the company to produce high-quality training materials using a variety of delivery mechanisms, capacity to produce training quickly, solvency of the vendor (to ensure that they last throughout a long program development time), the quality of their instructors, and your gut feel about how it would be to work with them, etc.

4. Create a request for proposal (often referred to as an RFP), which includes design specifications that detail your requirements. (See McCoy, 1993; and Abella, 1986 for more information on design "specs.")

5. Review proposals and work samples. Make sure that you review written proposals, and sample training materials to get a feel for the consultant's style, approach, and competence.

6. Check references. It is amazing what you can learn by speaking with other people who have worked with the vendor. It can help you avoid a disastrous decision or learn how to work most effectively with the consultant that you hire.

7. Meet with the finalists, and make sure that you speak with the people who will actually do the work, not just with the sales person. If you are selecting a consultant to deliver training, make sure that you observe the instructor to ensure that they are competent and that there is a fit with your organization. If you cannot observe them teach a live program, you can usually observe them on video tape.

8. Negotiate with the consultant to ensure that you get the best deal before making your decision. In one instance I had a consultant reduce his fee by $40,000 in order to beat out a competitor's bid.

Hiring the right consultant is only half the battle. When you are short of resources,it is tempting to think that a consultant will do all the work for you. With customized programs, consider the time and effort required to manage consultants. While consultants have expertise, they require guidance and monitoring. Unless they understand your business, the consultant's programs won't truly meet your business' needs. Farewell in the American Honda case mentions that he selected a consultant who rode a motorcycle, and that ongoing communication with this consultant helped contribute to his project's success. The consultant's contribution varies tremendously depending on how you manage them. Even though consultants are outside your organization, they should not appear to be external or out of touch with your organization's issues and culture. This may require considerable coaching from you. You should not let consultants run loose throughout your organization. If you have hired them, they represent *you*.

Some keys to working well with consultants include the following steps. First, make sure that you create a well-thought-out contract that clearly specifies the roles and responsibilities of the consultant and your organization. Next, it is important to build a

project plan with regular milestones, and clarify expectations of how you and the consultant will work together. It is essential that you provide an orientation and introduction to your organization. For a program to be effective, it is important that the consultant understand and fit within your organization's culture. See Nunziati's case on Logitech and O'Neill on Rock-Tenn. Be sure that you follow up at significant milestones to ensure that the consultant is progressing on schedule. Finally, it is helpful to have a safety valve and a back up plan in case the consultant fails to meet dead lines or does not work out as planned.

Avoiding Common Pitfalls in Managing a Small Training Department

Inevitably in a small training department there are common pitfalls, which can drain you of energy and undermine your effectiveness. Learning to identify, avoid, or overcome the following dangerous traps helps to ensure your success:

? ***Trying To Do Too Much***. First, don't try to do too much or you will become overwhelmed. When starting up a training department, you may be flooded with requests for all the training that people wished they had had when there was no training department. With all the pressure, it is easy to get into a reactive mode. Being in continuous crisis can exhaust and discourage you, and burden you with short-term requests so you neglect longer-term priorities. Avoid a fire-fighting mentality by having a strategy and mission, by assessing needs in order to understand expectations and priorities, and by creating a business-focused plan. Having a longer-term focus not only helps the organization you serve, it also helps you stay true to your values and priorities. Learn to make choices to respond to what's really important versus what is merely most urgent.

You can become more focused, motivated, and organized by visualizing your goals and taking actions that make it easier for you to accomplish them. For example, I learned to overcome writer's block by visualizing my completed book and how pleased I would be once it was finished. Then I bought more comfortable office equipment and took regular replenishing breaks. By respecting my own natural working cycle, I was able to work for much longer periods. This same principle helped me overcome obstacles in my business work as well.

Learning to say no to bad business enables you to avoid wasting money and to focus training where it will do some good. While saying no can feel risky, proposing a better solution helps to build your credibility. A previous employer asked me to provide telephone skills training for the entire company in order to solve some service problems. After some research, I learned that the primary service problem was customers not being able to reach the right person and being stuck in an endless loop of phone mail. This was caused by operators referring customers to wrong departments and by customers having no option to "pound out of phone mail" to reach an actual employee. I recommended that management take a hard line on providing phone coverage rather than providing telephone skills training to everyone. The company saved a lot of money and improved

service when operators began directing customers to the right departments and senior management told employees that they needed to have a live person on call in case people needed to reach someone immediately.

? Doing Everything Yourself. Some people who are new to training feel that they must design, develop, and teach everything themselves. This pitfall is particularly tempting if you especially enjoy designing and teaching training. Doing everything yourself not only leads to early burn-out, but it also limits your capacity and creativity to meet business needs. Avoid trying to do it all yourself by taking advantage of other resources inside and outside your organization. Once you've conducted some train-the-trainer programs with internal resources, you will have a ready network of trainers to help you in the future. Consider implementing a learning discussion network to build skills of prospective trainers. Building relationships with trusted external vendors will also save you time—eventually they will learn to know your business and how to work effectively with your company.

Be sure to garner administrative support to help you with program logistics. Create simple to-do lists to help your administrative assistant accomplish important tasks in a timely manner without needing to bother you. The lists will help you in managing yourself as well as any assistant. Even if you cannot obtain a full-time administrative assistant, find ways to borrow support from a nearby department, or hire temporary help. At one point when McCoy's administrative assistant was laid off, she was able to find administrative support by dividing up the work between other administrative assistants in the human resources department. Adding these responsibilities to other people's roles enabled them to master program requirements, simplify program logistics and gain credit for doing the work.

? Choosing Overly Complicated Solutions. As a training professional who may have been used to a large budget and more resources, you may be tempted to look for sophisticated training solutions when lower-cost, simpler solutions will do. In some cases you may be able to teach straightforward skills through a fairly inexpensive job-aid that may take the place of a training workshop. If you are introducing CBT, be sure to start simple and build the needed relationships with senior management and the technology department so that they will support your efforts in e-learning. Remember, when you have a very long development time, your CBT may be outdated before it is even launched.

Don't assume that the company needs the latest and greatest technology in order for training to be effective. Look to PowerPoint as an effective, simple, inexpensive CBT solution. Also keep in mind that custom CBT solution may not be required. There is an abundance of technology-related management and soft skill courses available in the e-learning market. Be sure to preview the available courses for quality, and negotiate a pricing and licensing option with the e-learning vendor that provides the optimum solution for your organization.

Make sure that your solution matches the sophistication of your organization. For organizations that have not been exposed to competency models and other development tools, it's best to start out with a simple approach.

*? **Neglecting Your Well-Being**. Fourth, don't ignore your own personal needs and health. In a one-person department, when you are sick, the whole department is down. Take care of yourself so that you have the energy to think and work long hours. Keeping a sense of humor is key. Follow sensible eating and exercise habits that help maintain your physical and emotional health. If your job entails air travel, make sure you plan appropriately to allow for adequate rest and also be sure to drink plenty of fluids and avoid alcohol. Being dehydrated, hung-over and jet-lagged do not help your credibility or your health. Participating in enjoyable activities helps to regenerate your spirit. If you travel as part of your job, take advantage of local opportunities when you are on the road. For example, I combine genealogical research with business whenever possible.

*? **Pessimism and Cynicism**. Given all your responsibilities, you may feel inconsequential and powerless especially if you are used to being in a large department. Don't get discouraged by obsessing about what you cannot do. This can be incapacitating and lead to inertia. Cultivate a sense of optimism by looking for opportunities to improve things versus dwelling on losses and possible dangers. Optimism enhances your ability to think of possibilities, to influence others, to build partnerships, and to overcome obstacles. Learn to focus on what you want to accomplish and how you can make a difference instead of on your limitations. My entire outlook changed when an executive told me that I would be much more effective if I focused on what I *could do* rather than what I could not do. This attitude shift increased my effectiveness and buoyed my spirits and confidence as well. Don't wait for change to happen, instead anticipate change and be part of making it happen.

*? **Postponing Your Own Development**. With all the pressure it is easy to neglect your own learning. Putting off your own development is costly--you miss opportunities to enhance training's effectiveness, connect with useful resources, prepare yourself for the future, and maintain your motivation. Participating in learning activities builds your skills and gives you a new perspective. Listen to audiotapes, read books and articles, research the web, and attend workshops to refocus yourself and to restore needed balance in your life. Learning a new skill unrelated to your job, such as playing the piano, painting or sky diving, keeps your mind sharp, builds your flexibility, and enhances your awareness of what's involved in the learning process itself.

An excellent way to build relevant skills, increase your network, keep up with current trends, and refresh your enthusiasm is to share your expertise with others. Seize opportunities to speak at training conferences, instruct courses at a local college, or write articles. Publishing is a wonderful way to deepen your knowledge, hone your writing skills, and build your credibility inside and outside your organization.

Small Training Department—Big Impact: Having the Right Skills
Carol P. McCoy, Ph.D.

In a specialized training role, you need to have specialized competencies, such as design, needs assessment, or facilitation. But what if you are a one- or two-person training department and are responsible for all aspects of training? What do you need to be good at to have an impact on your organization? Successfully managing a small training department requires a broad base of competencies.

- Business knowledge
- Knowledge of training and performance
- Organizational and management skills
- Intellectual skills
- Relational skills
- Technical skills
- Resourcefulness
- Resilience

Business Knowledge. Having a basic understanding of business dynamics, and of your organization's goals, performance and key success factors is essential. Make sure that you have a good understanding of business basics and of your industry. Take time to read industry publications to keep on top of current trends. Understanding your organization's budgeting system will be helpful since you will need to project and report the training budget in language that the organization understands.

Knowledge of Training and Performance
Consulting. Having a basic understanding of needs assessment methods, adult learning theory, writing learning objectives, training design, facilitation skills, and performance consulting is critical for a one-person training shop. You will need these skills to perform tasks, such as needs assessment, design, and delivery. In addition, you will need this knowledge to review training plans or programs that are developed or purchased.

Organization and Management Skills. Since a key to success is focus and careful management, you need to create some system to organize yourself. Whether you use a simple to-do list or complex project planning software, you need to keep yourself on track. Be sure that you create a checklist to help you manage program logistics. Knowing when to follow up can prevent costly mistakes and wastefulness. When managing budget expenses, you need to ensure that vendors are paid in a timely way or you may encounter problems. For example, without your follow up on invoices that are submitted late in the calendar year, vendors may not be paid in the current year. If this happens, you may be under budget in the current year and over budget for the upcoming year.

Intellectual Skills. Having solid cognitive skills goes a long way in enhancing your effectiveness in a small training department. Critical intellectual skills are observing, identifying problems and priorities, asking thoughtful questions, analyzing data, and taking a systems approach to problems. You'll need these skills when assessing needs, establishing your business savvy, uncovering the real causes of problems and proposing realistic solutions that can work in your organization.

Relational Skills. A key part of being successful is building relationships with people throughout your organization and the broader community. You need to be able to create a positive impression, identify peoples' needs and expectations, and attend to verbal and non-verbal clues. Other essential communication

skills include giving feedback, coaching, and influencing others. You need to give effective feedback and coaching to sponsors as well as trainees, and to convince stakeholders to support your training strategy and training initiatives.

The more flexible you can be in your influence style, the better. Don't assume that a training need or problem is obvious to others. Be patient in clarifying the benefits and requirements of training in everyday language that your customers can understand.

Technical Skills. Being able to use the web, create presentations, and manage a budget on a computer are critical in a small training department. At the very least, you need to know how to use a word program and some presentation program, such as PowerPoint. Knowing Excel or some other type of spreadsheet program to create and track a budget and to evaluate programs is helpful. Become familiar with the advantages, requirements, and constraints of various e-learning options.

Given the wealth of resources available on the Internet, you should know how to conduct research using the Internet. Also, you need to know enough "systems speak" that you can converse intelligently with your organization's systems team to identify the organization's capabilities to support training.

Find out about your organization's intranet and email capabilities so that you can take advantage of them as delivery systems.

Resourcefulness. Thinking of a variety of options is essential to your success. Tunnel vision and rigidity can be your demise in a small department. A broad base of potential internal and external resources can help you leap into action and meet a tight deadline. The more flexible your solutions, the more likely you will find the best approach for your organization. As training dollars shrink, you'll need to cut back on training. Don't assume that because a program is shorter than ideal that it is of no value. People can be motivated to try out new skills when they have participated in an inspiring "lunch and learn" program.

Resilience. Resilience—bouncing back from stress and change—may be the most important competency for anyone today. A major challenge is keeping up with constant change and pressure without being overwhelmed. Resilient people tend to have an opportunity orientation, focus, flexibility, organization in the face of ambiguity, and a proactive approach. Learn to find the opportunity in any change and look for ways to actively support the success of organizational change. Also, be sure to take care of your physical and mental health. Remember, when you are sick it impacts the entire department.

Enhancing Your Value to the Organization. One of the best ways to ensure that you develop the necessary knowledge, skills, and personal attributes is to create a developmental plan and then *do it*! Make your development part of your performance plan. Be sure to review your developmental plan with your manager and allocate some budget for your own growth! When you are starting out, you may find that you have many developmental needs. Rather than trying to learn everything at once, select two or three learning priorities and set some realistic goals.

Look for a variety of ways to enhance your skills by selecting cost-effective learning activities, which meet both your and your organization's needs. Attend local and national training conferences to build skills and increase your network of resources. Perhaps you can job shadow people in different roles in the company. Find a mentor who can provide feedback and coaching and be a support when you are feeling discouraged. Remember *you* are the department's *primary asset*. As your knowledge and skills increase, so does the capability and effectiveness of the training department.

ACTIVITY AND ASSIGNMENT:

1. If you are training manager of a software company employing 500 people. How will organize the training department.
2. Prepare a Organisation chart of Training Department in larges scale manufacturing organization.
3. Explain the role played by training and development department in the organization.