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Training And Development

An Introduction To Training

During the height of the space race in the 1960s, NASA scientists realized that ink pens could not function in space because of the lack of gravity, ink doesn't flow downwards and therefore conventional pens are useless.

They needed to figure out another way for the astronauts to write things down. So they spent years and millions of taxpayer dollars to develop a pen that could put ink to paper without gravity.

Eventually a pen that could write in space was produced by using a tiny pump to force the ink gradually out of the nib of the pen. The pens cost a thousand dollars each.

In Russia they simply handed their cosmonauts pencils.

When you identify a need, it's best to work out the details before rushing to quickly produce a solution.

The same is true of training. Often training is seen as a magic bullet that eliminates all issues you could have with a staff member, and to a certain extent this may be true. But if we fail to plan and prepare training effectively, if we don't assess the situation as it is right now, and if we don't look at the need(s) we have identified in an intelligent way, we can end up investing time, effort and resources only to discover that rather than handing staff members a new tool or technique, an existing solution would have worked better.

The above story isn't intended to dissuade you from training, but merely to illustrate that training should be treated as an investment of your time, an investment that you carefully consider and manage so that it arrives at the outcome you desire.

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What Is Training?

Training is the provision of new information to groups or individuals, and forms part of the foundations of a growing business. As our marketplace rapidly changes, becomes more regulated and densely crowded with competitors, we will need to adapt quickly.

Training supports the changes a business makes by ensuring that staff and Managers are clear, capable and motivated to perform at the expected level.

Training should break down barriers that you or your staff have identified and ensure a greater level of capability moving forward. It should provide you with tools for the future that become ‘sharper’ with each use. Eventually a good manager will pass on their tools, honed by experience and time, to a new trainer, coach or mentor so that they can continue to develop others.

The Training Cycle

The Cycle

An actual training session forms only a small component of a training cycle. Trainers need to be aware of the whole cycle in order to deliver effective sessions that grow individuals and add real value.

Training cannot function in a vacuum. What this means is that training in exclusivity is rarely the answer to an issue. Coaching, feedback, follow up, incentives and coaching all need to support training and vice versa.

To effectively assess training needs we can perform a skills gap analysis, we need to:

- Identify skills needed
- Evaluate team or individual
- Assess results
- Create a skills development plan

Step 1: Identify Skills Needed

The first step is to identify what skills are needed for the team or individual. A good way to do this is to break these up into different sections, such as responsibilities, tasks, functions, and knowledge needed.

When determining skills, keep business goals in mind. Do the skills align with the teams/ organisation's objectives?

KPIs – How are your team members achieving against these AND what skills would they need in order to improve?

Compliance – Are any staff a risk to the business or customers? What skills would they need to mitigate this?

Customer Service – Are there skills you want staff to have in order to manage their customers?

Where would you find this information?

- Call audits, call trackers.
- Compliance Audits
- Live Observation
- SWOT Analysis
- NPS Comments
- Staff identified issues
- Feedback from lenders, introducers, other departments

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What Does Your Team Need To Be Doing?

What KPIs, metrics and targets do your staff have on a daily, monthly and quarterly basis? Are there upcoming changes that affect staff members and will need to be rolled out?

Action

Look at what your staff have to do with regards to targets. Break these down into skills required in order to achieve those targets.

For example, close rate is a KPI, within that target, a set of skills is required for a staff member to close effectively (objection handling, product knowledge etc.)

Step 2: Evaluate Team Or Individual

Once you've identified the necessary skills, do a current evaluation of your staff.

Where are your staff currently achieving against this skill or skills? It is useful to look at ALL staff as you can identify best practice and expert role models to potentially support your training.

Look at audits, questionnaires, 121s, group discussions, assessment tools, etc.

Step 3: Assess The Results

Now that you've collected your data, compare the findings and measure the differences between the skills identified/needed and the skills of the individual or team.

Take note of any large or obvious gap in skill. Get granular, don't leave the skills gap broad, go into detail.

Interpretation is always varied so keep an open mind.

Once you have an understanding of the expectations placed upon your staff, you need to see where they sit currently against those targets.

Action

Assess your team's achievement against targets.

When you identify a shortfall, dig deeper to get granular insight to understand what specific skill or skills is lacking/ missing/ in need of improvement.

Step 4: Create A Skills Development Plan

Finally, create a plan of action. Come up with ideas as to how you will need to address the skill gaps and what kinds of things you need to do to create progress from this point forward.

Develop recommendations that address the gaps, you should then be in a position to identify what is training, coaching, feedback etc.

The intent is to separate out what activity will need to be trained out as new knowledge, what can be built on with coaching, and what can be communicated out in feedback.

Look at your skills gaps, which of these can be reconfirmed through communicating your needs with team members and following up though the feedback and follow up flow?

What can I coach out?
Look at your skills gaps, what can you build upon that already exists within your team's skillset? This can be coached out individually using your sports coaching methodology.

What needs to be trained?
Look at what you have remaining, these are your training needs

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Developing And Designing Training

First: Afters

What is the GOAL of your session?

What do you want staff to do more/better/ less after training has finished? Consider whether the session is part of a successive skills building program. Just like coaching, you can break down learning to make it more easily digestible.

E.g. Objection handling is a large skill, but could be broken down into components (listening, answering, closing etc.). These components can then be individually produced to ensure the delegates come away with the correct actions.

What do you want delegates to DO afterwards?

What specifically (as an actionable behaviour) do you want staff to do? Will they change a behaviour, alter a process, use a piece of dialogue, or record instances of an event?

You must ensure that it is crystal clear what you want staff to do, if this isn't immediately clear, it can't land well and be performed by a staff member.

What is the benefit of this training to your delegates?

Once you know: This is your session title, you need to sell the benefits of the training by advertising the value of it to your staff members. That way you ensure more receptive attendees at the start of training and set yourself up for success.

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Next: Takeaway

Is there a hand-out? Do you need a hand-out?

Will support material do just that, will it SUPPORT or draw focus away from the training? Often trainers hand out copies of the slides at the start of training – this can pull focus from you as a trainer as staff rely on looking down at the material.

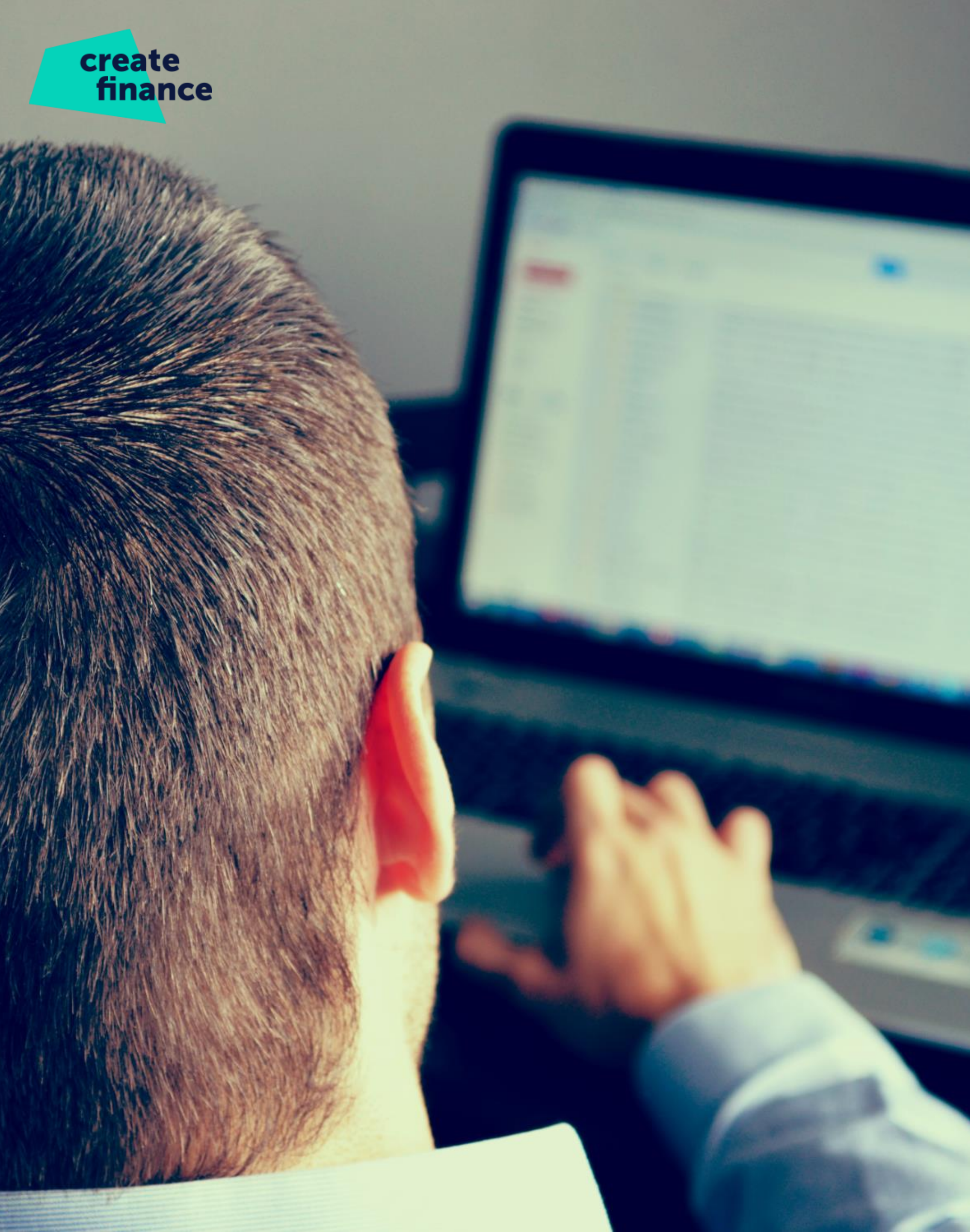
When will you hand out your materials? This is an important consideration:

Is the handout a 'live' document that is added to throughout training like a workbook? Is it a pamphlet to refer to post training? Is it a process map to follow? Do staff require a reminder of training? – Think back to your feedback and coaching, will a visual prompt work?

Will delegates produce their own take away?

This can be a powerful activity within the training session, especially when building dialogue or best practice examples for staff to undertake.

You don't have to work alone! Most issues that arise as training needs may have already been addressed by others, seek support and materials from others that you can adapt…steal with pride!



Then: Assess

To assess the success of your training, there must be a measure: What is the metric or KPI improvement you are aiming for? Ensure this is realistic but also that this is communicated to attendees and anyone supporting training. This is your objective that must be reached and judges the value of the material delivered.

Consider:

- How, how much, by when?
- What metric or figure are you trying to improve?
- Who will track this?

Action Planning

Just like feedback and coaching, training activity should end with actions set both for the staff member(s) to perform and the trainer to follow up with. Actions and their completion form the basis of your assessment into whether the training was effective.

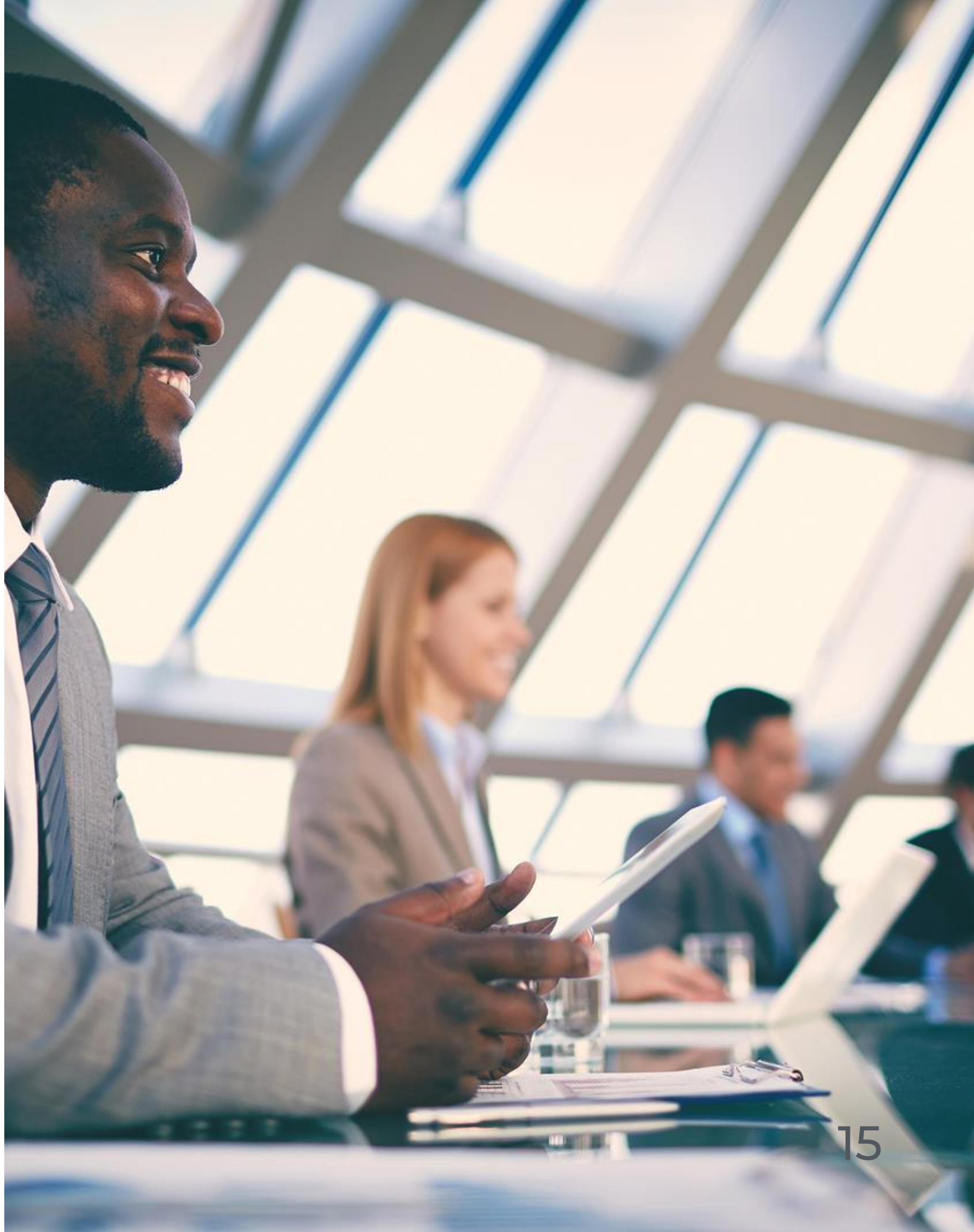
Training without actions for staff members to undertake quickly gets forgotten, misinterpreted or changed in a way you cannot control. Ideally the actions you set staff members have been planned before and align with your metric or KPI improvement.

Last: Delivery

Now that you have considered all of the above points, you can move to looking at what form the session will take.

How will you deliver the session?

Let's look at some ideas you can consider and their application. Bear in mind, these can be combined to form a longer session. Sometimes they will have to be added to a larger training piece to contextualise what you are doing.



Break The Ice

Icebreakers set the tone of a session and loosen up delegates who may have been anxious or worried. They are also an excellent tool for identifying strong personalities, potential issues and individuals who aren't yet engaged.

Icebreakers should be short and sweet, you don't want to be spending hours on these. Below are a few examples you can use. Your icebreaker should grow with you as you gain experience. Don't be afraid to create your own!

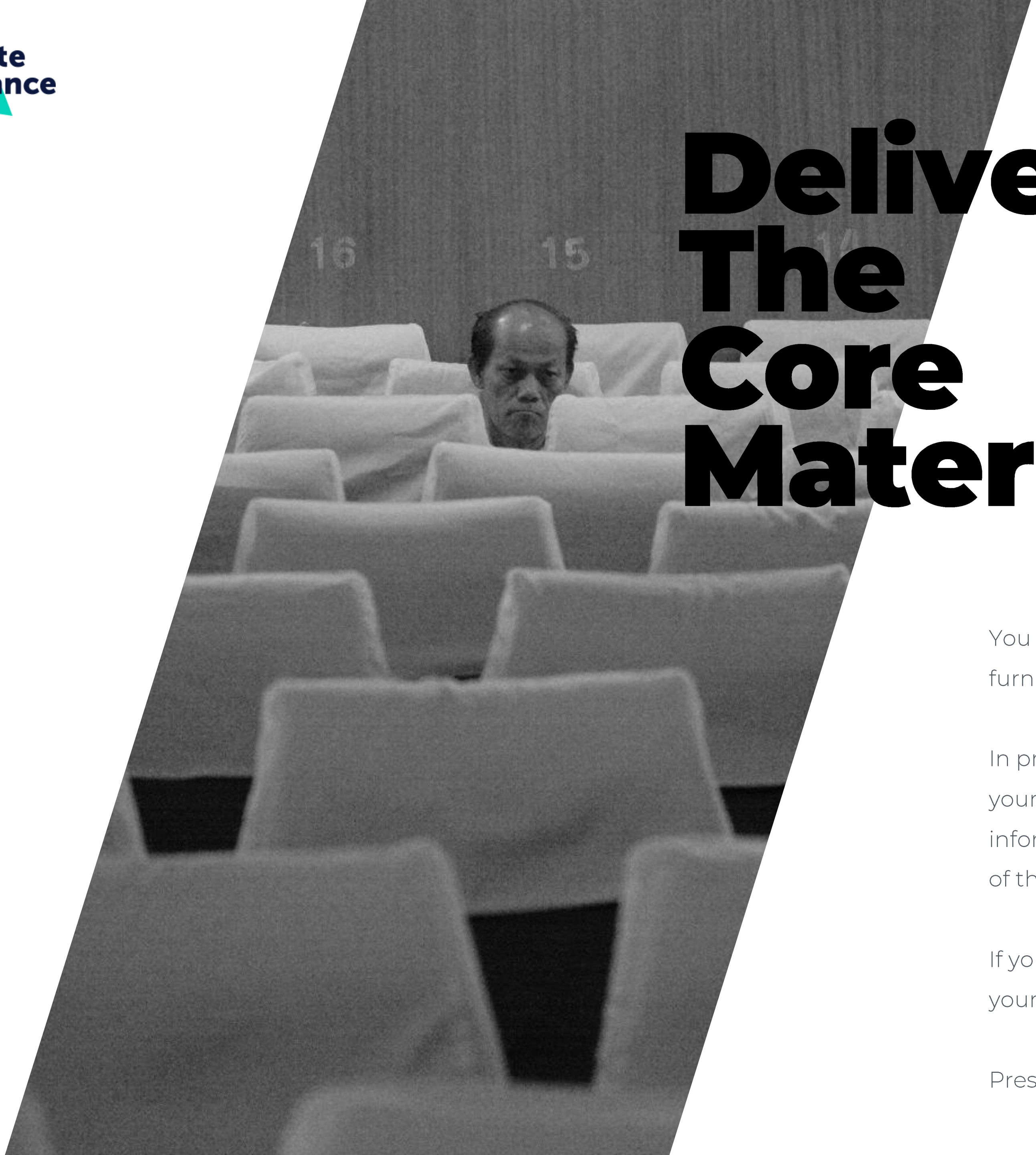
Example – Name That Person:

Divide into two teams. Give each person a blank piece of card. Ask them to write five little known facts about themselves on their card.

Include all Managers in this game too. For example, I have a pet iguana, I was born in Iceland, my favourite food is spinach, my grandmother is called Doris and my favourite colour is vermillion.

Collect the cards into two team piles. Draw one card from the opposing team pile. Each team tries to name the person in as few clues as possible. Five points if they get it on the first clue, then 4, 3, 2, 1, 0.

The team with the most points wins. (if you select the most obscure facts first, it will increase the level of competition and general head scratching!)



Deliver The Core Material

You have already identified what you want these delegates to DO. So furnish them with the knowledge or skills to achieve that.

In presentation etiquette, it all comes down to one thing: valuing your audience. This means speaking directly to them, having all the information prepared and practiced, and above all, being worthwhile of their time.

If you remain focused on providing value to your audience, you'll find yourself giving successful presentations every time.

Presenting is difficult, and there are a number of points to consider:

Best Practice

Edit yourself

You could talk about your material, but don't. Presentations are meant to educate and intrigue, not to bore. Give your audience enough information to pique their interest and then direct them to other resources for more information or move onto an activity that applies their learning.

Minimize word count

If you are using PowerPoint, put no more than 10 words on each slide. Minimizing text on the slide also minimizes distractions, allowing your audience to focus on your speech and your message.

Relate to the audience

Use personal stories, examples and custom demos to help your audience relate to you. Remember, their problem should be your problem, so don't be shy about letting the audience know you understand their concerns.

Rehearse, rehearse, rehearse

Do not just think you can wing a presentation. You need to rehearse and then warm up. Feeling comfortable and practiced will help calm your nerves and keep you from freezing onstage.

Follow up, stand out

Once the presentation has ended, don't let your communication skills fall flat. Be sure to follow up with any individuals you met before or after the presentation, and make sure your electronic communication is as effective as your in-person communication.

Actions To Avoid

Trying to be funny if you're not

While well intended, humour doesn't always translate onstage, particularly if it's not practiced. Rather than trying to dress up a presentation with unnecessary elements, focus on delivering an impactful, engaging message and you will succeed every time.

Focusing on a big stunt

Often presentations, especially those where you are pitching a new idea or concept, are limited to a few short minutes. Rather than waste time trying to execute a stunt that has nothing to do with your training need, spend those precious minutes talking about what you actually have to offer.

Leaving your personality backstage

People want to feel a personal connection to you. They want to feel like they are training with an actual person rather than a robot. That human element has to come from you. Showing personality onstage lets the audience see the person behind the company, and makes for a more engaging presentation -- something every presenter should strive for.

Reading your slides

Do not ever do this.

Even the most well-practiced presenter comes off sounding monotonous and boring when reading slides. Plus, breaking eye contact with your audience is a sure-fire way to lose their interest.

Practice, but don't memorize and don't read word for word. If you mess up or stumble, that's okay. If anything, it brings out that human element the audience is seeking.

More Actions To Avoid

Wasting their time

People attend presentations with a specific objective in mind: to learn. Don’t waste their time by talking about irrelevant information or showcasing unnecessary “flair.” Being succinct is your responsibility as a presenter and something your audience will thank you for.

Forgetting to prepare for questions

Often speakers focus on the presentation so intently they forget to prepare for the Q&A session afterwards. Don't be that person. Try to anticipate the kinds of questions they might have and be prepared with answers. A poorly planned Q&A session can overshadow even the most successful presentation.

Show, Don't Tell

Break up your delivery by engaging with your delegates in activities that again help to contextualise the learning, practice skills and simply get the blood flowing to their brains!

Look at your material and split it into no more than 10-15 minute sections. You need to switch up what you are doing before the delegates become fatigued.

The best training involves the delegate at all points. Remember your coaching sessions, first you demonstrate, then you watch as the staff member performs the task. Training is no different.

There are a number of valuable activities that you can use to help apply your material and involve your delegates.

Presentation Techniques

Body Voting

For any size group, ask individuals to stand or sit based on their answers to questions OR to move to a part of the room to answer multiple choice questions. This is great to get the energy going at the start of a session and to illustrate a point or identify what the group thinks, feels or believes.

Buzz Group

A small group or groups (the buzz group(s)) breaks off from a larger group in order to generate ideas to take back to the larger group for discussion or decision making. This is great for problem solving as you generate more than one solution OR for dialogue building as you get more suggestions.

Case Study

An in-depth investigation of a single individual, group, or event to explore causation in order to find underlying principles.
This is useful for regulatory or academic courses that are potentially quite dry and need to be put into context in order for delegates to relate to them.

Presentation Techniques

Critical Incident

The telling of an individual experience (a critical incident) in story format, which is analysed for its significant contribution to an activity or phenomenon. Auditing and group levelling would fall into this category.

Graphic Recording/ Graffiti Wall

A visual record of an event using images, symbols and words. Great for summarizing conversations and connections.

Ignite

Similar to Pecha-Kucha (see below) except using 15 slides for 20 seconds per slide (5:00 minutes total). The restrictions placed on the trainer often means more creative solutions are found. It is also useful to generate shorter, more impactful micro learning.

Presentation Techniques

Jigsaw

A small group technique where participants are paired with experts to learn a subset of material and then re-join the group as instructor on the subset material.
This helps create new expert role models and can be used as part of a call listening session.

Open Space

A flexible format focused on an important purpose or task, but beginning without any formal agenda, beyond the overall purpose or theme.
This is good for feedback sessions or where you want to see the lay of the land before launching formal training.

Pecha Kucha

A fast-paced, fun presentation using 20 slides for 20 seconds per slide (6:40 minutes total).
This is good as an activity that you set delegates as part of training to make them recap and relay learned information back to the group

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Presentation Techniques

Poster Session

A presentation of peer-reviewed research information in the form of a poster. Prominent at scientific or medical conferences, this is a great way to make large amounts of similar information digestible e.g. Product Knowledge.

Simulated Encounter

An experiential format designed to represent real-life scenarios like a sales call or customer service interaction. Think Roleplays with an audience.

Spectrogram

An interactive exercise which highlights the range of perspectives in a group. A facilitator asks a question and participants line up along a continuum.

Mini-Lecture

An abbreviated presentation, sometimes followed by a facilitated discussion for the remainder of time allotted.

Other Considerations

How long does the session need to be?
Remember we are training to improve the performance of any staff member. If we train the staff members to be the absolute best they can be, but for example, take them off the phone for days to do this, we haven't improved performance efficiently.

Conversely, if we never take staff members off the phone their skills become stagnant and performance overall drops. We don't start a building projects without first knowing the budget we have to work with. The same is true of training.

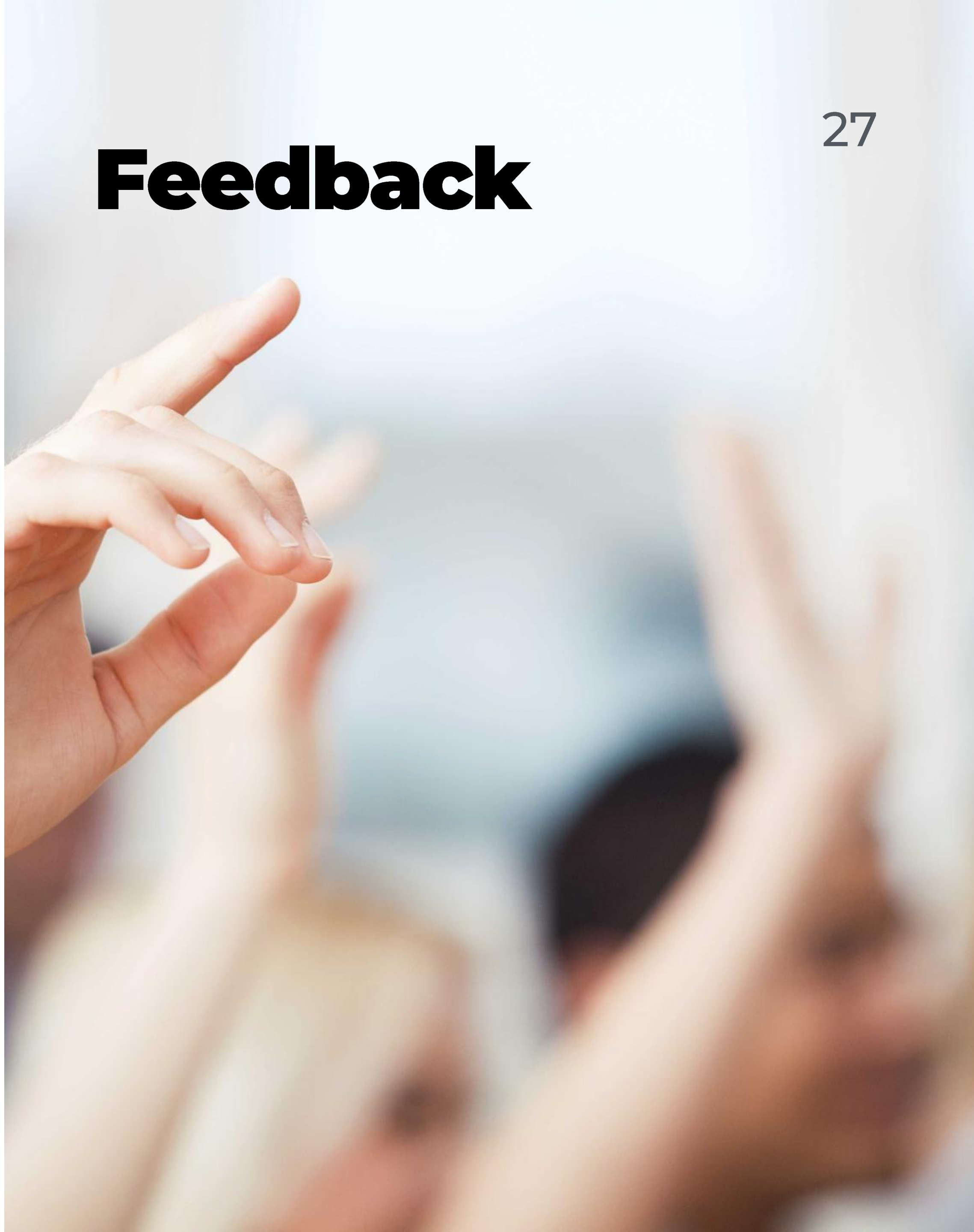
Find out the resource available and work within that time, if you plan training before timescale has been established, you will find yourself disappointed.

Where will you hold this session?
Venue is a consideration when developing a session. What facilities will be available to you? Is there a computer, a wall board, seating for the staff members? All this comes into play when planning.

Who needs to attend?
If you have run a skills gap analysis, you should know who this material is for already, however you must consider the impact of NOT inviting individuals AND the impact of inviting specific individuals. Both can imply something that you didn't intend: that a staff member isn't good enough or that a staff member isn't valuable enough for training. It is better to cover an entire team than exclude a couple of individuals.

Managers should always strive to attend the training delivered to their teams so that they have a good grounding in what has been rolled out to their staff.

Feedback



You need feedback in order to evolve your training. As a trainer you're often too close to the material to step back and look at it in a truly objective fashion, plus you've been delivering this material...you can't observe yourself!

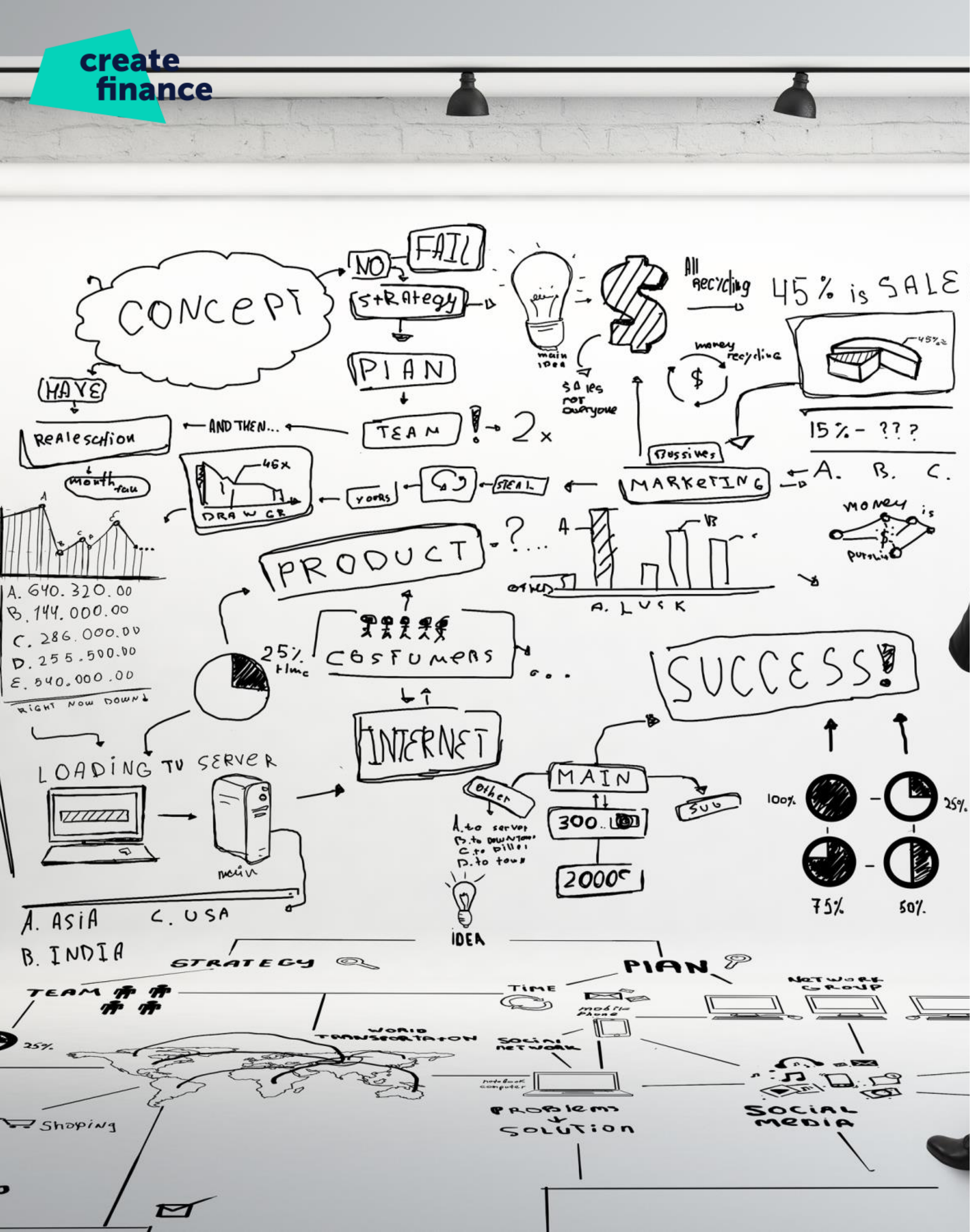
Feedback is more effective when it is anonymous and has a mix of metrics you can measure and comments you can consider.

You should seek feedback at the end of your sessions to help refine what you have delivered. Recording this feedback and what you have done off the back of comments or metrics will show the evolution of your training.

Metrics are good to give tangible 'scores' that can be developed into personal targets. E.g. On a scale of 1 to 10, how knowledgeable was your trainer? OR On a scale of 1 to 10 how confident do you feel in your role post-training?

Comments give delegates free reign to comment and provide their views on the materials, the slides, anything you want to know about! It's best to keep the questions broad so you can pull out more development and don't lead the staff member.

Action
Seek feedback from L+D or your mentor (or both!) on a session you deliver.



Four Level Evaluations

The four levels of the evaluation model essentially measure:

- Reaction of student - what they thought and felt about the training
- Learning - the resulting increase in knowledge or capability
- Behaviour - extent of behaviour and capability improvement and implementation/application
- Results - the effects on the business or environment resulting from the trainee's performance

All these measures are recommended for full and meaningful evaluation of learning. Their application broadly increases in complexity, through the levels from 1-4.

Level 1: Reaction

Reaction evaluation is how the delegates felt, and their personal reactions to the training or learning experience, for example:

- Did the trainees like and enjoy the training?
- Did they consider the training relevant?
- Was it a good use of their time?
- Did they like the venue, the style, timing, domestics, etc?

You can assess this In a number of ways:

- Feedback forms based on subjective personal reaction to the training experience.
- Verbal reaction which can be noted and analysed.
- Post-training surveys or questionnaires.
- Online evaluation or grading by delegates.
- Subsequent verbal or written reports given by delegates to managers back at their jobs.

Why is this valuable?

- This can be done immediately the training ends.
- Very easy to obtain reaction feedback
- Important to know that people were not upset or disappointed.
- Important that people give a positive impression when relating their experience to others who might be deciding whether to experience same.

Level 2: Learning

Learning evaluation is the measurement of the increase in knowledge or intellectual capability from before to after the learning experience:

- Did the trainees learn what was intended to be taught?
- Did the trainee experience what was intended for them to experience?
- What is the extent of advancement or change in the trainees after the training, in the direction or area that was intended?

We can assess this in a number of ways:

- Typically assessments or tests before and after the training.
- Interview or observation can be used before and after although this is time-consuming.
- Reliable, clear scoring and measurements need to be established, so as to limit the risk of inconsistent assessment.

Why is this valuable?

- Relatively simple to set up, but more investment and thought required than reaction evaluation.
- Highly relevant and clear-cut for certain training such as quantifiable or technical skills.

Level 3: Behaviour

Behaviour evaluation is the extent to which the trainees applied the learning and changed their behaviour, and this can be immediately and several months after the training, depending on the situation:

- Did the trainees put their learning into effect when back on the job?
- Were the relevant skills and knowledge used
- Was there noticeable and measurable change in the activity and performance of the trainees when back in their roles?
- Was the change in behaviour and new level of knowledge sustained?

We can assess this in a number of ways:

- Observation and interview over time are required to assess change, relevance of change, and sustainability of change.
- Assessments need to be subtle and ongoing, and then transferred to a suitable analysis tool such as a tracker.
- 360-degree feedback is useful method and need not be used before training, because respondents can make a judgement as to change after training, and this can be analysed for groups of respondents and trainees.
- Assessments can be designed around relevant performance scenarios, and specific key performance indicators or criteria.

Level 3: Behaviour

Why is this valuable?

Evaluation of implementation and application is an extremely important assessment - there is little point in a good reaction and good increase in capability if nothing changes back in the job, therefore evaluation in this area is vital, albeit challenging.

Behaviour change evaluation is possible given good support and involvement from line managers or trainees, so it is helpful to involve them from the start, and to identify benefits for them, which links to the level 4 evaluation below.

Level 4: Results

Results evaluation is the effect on the business or environment resulting from the improved performance of the trainee - it is the acid test.
Measures would typically be business or organisational key performance indicators, such as:

Volumes, values, percentages, timescales, return on investment, and other quantifiable aspects of organisational performance, for instance; numbers of complaints, staff turnover, attrition, failures, wastage, non-compliance, quality ratings, achievement of standards and accreditations, growth, retention, etc.

We can assess this in a number of ways:

It is possible that many of these measures are already in place via normal management systems and reporting.
The challenge is to identify which and how relate to to the trainee's input and influence.
Therefore it is important to identify and agree accountability and relevance with the trainee at the start of the training, so they understand what is to be measured.

Next Steps

Identify a Training Need

Follow the methodology for identifying training needs OR elaborate on a need you have already identified through feedback and coaching.

Follow the DATA Model to Plan Training

Work through the DATA model to develop training material. Review your work to ensure that you meet each of the criteria to ensure the material will land correctly.

Deliver Your Material and Seek Feedback

Deliver your material to delegates, preferably whilst observed by a coach. Seek feedback from your team and coach to continuously improve.