Creating Standards in Training Excellence: Trainer Development and Certification
CompuCredit

Background: CompuCredit is an information and technology driven provider, direct marketer, and servicer of branded credit cards and related fee-based products and services to consumers who may have been overlooked by other traditional providers of consumer credit. CompuCredit focuses on building and being the most profitable financial services company for the underserved consumer.

In 2005 CompuCredit was named by Fortune magazine as the second fastest growing company in the United States. Through innovative products and a reputation for outstanding customer service, CompuCredit has been able to help many consumers establish or re-establish credit.

The training department, under the direction of Dari Damazo and through the leadership of Leigh Anne Bullock, had continued adding to their list of responsibilities knowing that as the company grew, the training department must lead the way in terms of skill, proficiency, and capability.

Challenge: It was becoming increasingly apparent that the training department was lacking a common foundation of skills and process required to excel at its work. While some trainers had advanced training, it was often focused in a specific area of training. And while a few had attended ASTD's trainer certification training or Langevin's courses, there was no shared set of design, development, and delivery competencies that CompuCredit trainers could call their own. Importantly, the majority of trainers had subject matter expertise only, and no real adult learning or training background.

CompuCredit Training and Development leadership team recognized the opportunity to set standards of excellence for instructional design and development, delivery effectiveness, classroom management, learner engagement and sensitivity, professionalism, learning evaluation, and overall instructional effectiveness.

Solution: The CompuCredit training department was starting virtually at ground zero in terms of a professional trainer capability and infrastructure. Therefore this initiative needed to consider more than a train-the-trainer development and certification program.

We began by defining the process by which "work would get done" from the initial request for training through training delivery and follow-up. (See graphic on right.) Working with the T&D Leadership Team, we clarified roles and responsibilities of trainers (who focused on delivery) and instructional designers (who focused on needs assessment, design, and development). We identified areas of collaboration and clarified responsibilities as they related to the new training process.

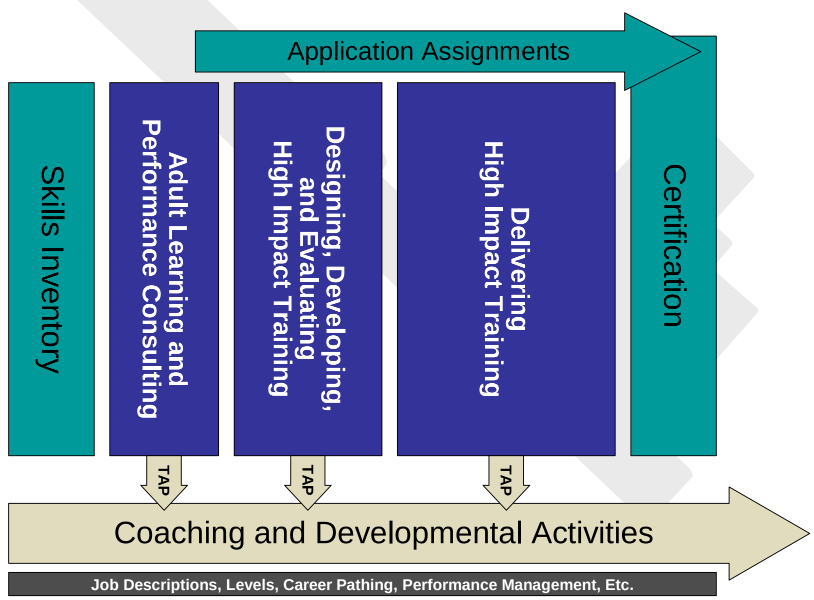
The Performance Consulting and Training Process
(Roles of ID and Trainer)

1. Request comes in to Training Department.
2. Training Leadership Team contact (Dari, Nicole, Michelle, Training Manager, or ID Manager) assigns an ID to the request. Training Leadership Team sets up an interview with the requestor and the ID. (Dari attending is optional.)
3. The ID leads the interview with the requestor asking questions such as:
   a. What is the need? What indicators point to the need? Is this something that has occurred recently?
   b. How is business impacted? What are the desired business results?
   c. What performance is required to achieve the business results?
   d. What is the current performance and/or business results?
   e. What are some possible reasons for the performance gap?
   f. What options have you considered? What would happen if you did nothing?
4. If the MOI might include training to be delivered by a Trainer, the Trainer is identified and notified; the Trainer's involvement is clarified.
5. The ID creates a Memo of Intent (MOI) outlining the need and training's response and rationale. The MOI is provided to the Training Leadership Team contact for review.
6. The ID sends the MOI to the requestor or meets with the requestor.
7. The ID works with business resources identified by the requestor (at the ID's request) to continue the needs assessment and training design.
8. The training design is reviewed by the requestor, appropriate business resources, and the Trainer.
9. The ID makes appropriate changes based on the feedback and begins development.
10. As required, the ID interfaces with the business resources for content and business process questions. The ID interfaces with the Trainer for instructor and learning activity questions.
11. If required, the ID schedules a walkthrough of the training with appropriate business resources (including the requestor, if appropriate) and the Trainer. The business resources and Trainer provide feedback which the ID incorporates into the training.
12. The Trainer reviews the final training materials and identifies questions for the ID.
13. The Trainer rehearses the training and prepares for the first delivery. Questions or concerns are addressed (within time constraints).
14. The Trainer conducts the first delivery of the training. If appropriate, the ID audits the delivery and makes notes of changes that need to be made.
15. After the first delivery, the ID and Trainer discuss and agree to changes. The ID makes the changes and provides the final master to the Trainer and to Training Administration.
16. The ID collects the Level 1 feedback and Level 2 assessment information and provides a report back to the requestor in a follow-up memo. As appropriate, the ID and/or the trainer work with managers to determine (and increase) on-the-job impact.
17. The Training Leadership Team contact follows up with the requestor and then recognizes the achievement of the ID and Trainer.

From the process development work, we identified the competencies required of instructional designers and trainers. We created competency inventories that were then used to create 1) job levels and descriptions, and 2) performance assessments to measure the skills of trainers and instructional designers.

Only THEN did we create a professional trainer and instructional designer development program. The program began with a skills inventory administered by the manager of the ID or trainer; it was an opportunity to clarify expectations and establish a personal focus for the upcoming training.

We created three core courses in the program. Each course included precourse work, a Trainer Action Plan (TAP) for on-the-job application of skills and concepts, and two certification elements:



Course Name	Description	Certification Elements
Adult Learning and Performance Consulting	Participants discovered key principles associated with 1) adults as learners, 2) the impact of culture on training (CompuCredit trainers trained in five different countries), and 3) building training that is tied directly to business needs.	Test: Pass a written test covering key concepts. Application Assignment: Interview a stakeholder and create a Memo Of Intent outline performance requirements and training's next steps.
Designing, Developing, and Evaluating High Impact Training	Participants learned the fundamentals of instructional design with an emphasis on writing clear, meaningful objectives; designing instructionally appropriate learning activities; and creating assessments that tested the achievement of objectives.	Test: Pass a written test covering key concepts. Application Assignment: Design and develop a course meeting all of the design and development requirements outlined in program.
Delivering High Impact Training	Participants learned – through demonstration and feedback – the behaviors of effective instructors and facilitators.	Trainer Demonstrations: Conduct a face-to-face delivery AND a webinar delivery to standards outlined in the program. ID Demonstration: Conduct a walkthrough presentation of the rationale and design of the training to standards outlined in the program.

<u>Results</u>: Feedback from participants was overwhelmingly positive. Not only did the T3 and certification process increase their capabilities, it also increased their confidence. For a few, it provided the perspective to determine if training was the right profession for them. For all, it elevated their respect for the rigor and science behind the art of training.

From a business perspective, the work with Entelechy has clarified job roles and responsibilities. It has allowed for a more deliberate hiring process as well as for a more consistent development and coaching process. Most importantly, Entelechy's training has ensured the clear link between training and business goals. In an industry that is ripe with business metrics, T&D is seen as a major contributor to improved business results since the training process was built with the goal, "improve business results."

Practically, the T&D team has reduced the length of its new hire training program by 50% and has embedded periodic measures to identify those who may not succeed on the floor. Standardized training evaluations are starting to form a baseline from which training can be improved. And regular feedback and input sessions with operations stakeholders ensure that T&D continues to be seen as an integral business partner.