

Training 101

The Reason We're All Here

With the talk of e-learning, webcasting, learning management systems, and synchronous streaming mind-meld, it's easy to get caught in the technological minutiae of our work. Sometimes we need to stop and rediscover why we're doing this in the first place: to increase the performance of individuals so they can contribute (i.e., more, better, faster) to the success of the business.

As trainers, we need to continually and consciously ask ourselves the Big Question: "What are we doing here?" I don't mean in the religious or metaphysical sense; I mean in the training and performance sense. The Big Answer for us in the training field is simple: "We're here to design, develop, and implement solutions that are going to help increase employee performance and positively impact business." We need to think less of training and more of performance. We need to rediscover and reapply our business-based performance consulting techniques.

The difference between training and performance consulting is subtle but critical. Whereas a trainer focuses on skills and knowledge, design, and delivery, the performance consultant focuses on business and on-the-job performance. The performance consultant is "in the trenches" figuring things out.

The trainer's role is to provide the best training possible: interactive, engaging training, complete with assessments, engaging graphics, and a training environment conducive to learning. The performance consultant sees his or her job as improving on-the-job performance by whatever means possible – usually the cheaper and quicker, the better!

The trainer is concerned about filling classes (butts in seats), scheduling, making sure that the training is enjoyable so graduates encourage other participants to attend, and learning. The performance consultant is worried about increasing retention (the turnover kind), increasing profits, and reducing expenses; moreover, the performance consultant is worried about taking the person away from the job for any reason.

The performance consultant is NOT just worried about a bigger picture; the performance consultant is worried about the ONLY picture – performance and how to increase it. Training becomes one of the many tools the performance consultant uses to increase performance. Other tools include mentoring, coaching, quick-and-dirty job aids, an email clarifying the expectations, a discussion with the manager about the need for a change in seating arrangements, or the synchronous streaming mind-meld.

There's a saying: To the hammer, everything looks like a nail. To a trainer, every problem looks like an opportunity for training. For a performance consultant, training is only one of many tools available to address performance problems.

Step #1: Desired Business Results

The first step in performance consulting is to clarify the desired business results. Why is it important to clarify desired business results?

Our goal as performance consultants is to increase business. This usually means:

- More sales (or more profitable or larger sales)
- More profit (which means greater efficiency or effectiveness)
- More productivity (which means more widgets produced and doing things faster and better)
- Less turnover (which means increased morale and motivation)

For example, let's say that we are an inbound customer service center with a primary focus on answering customers' questions. Upper management may wish to increase sales and see the service center as the place with the most potential for increasing sales. The desired business result would be to increase the number of sales in the customer service center.

To clarify the desired business results, we may need to:

- Interview the client
- Attend planning and other business meetings
- Read planning and other business documents



Step #2: Define Performance Requirements

Once business results have been clarified, the next step is to identify the performance requirements. For the organization to achieve the desired business results, people have to perform in a certain way (which is different than how they are performing today).

Continuing with the customer service center example, to increase the number of sales in the customer service center (the desired business result), we believe that each rep should position a product or service that may be appropriate and of value to the customer. This performance requirement may have a number of supporting performance requirements including:

- Listening for clues that would link to additional products or services (which itself would require product and service knowledge/information)
- Probing and listening

- Positioning appropriate products and services

The premise of performance requirements is, “If we were to effectively do all these things, we would achieve our desired business results.”

We identify performance requirements by:

- Interviewing managers
- Interviewing and/or observing exemplary performers
- Research of other companies

Once we’ve identified performance requirements (which will ensure that we achieve our desired business results), we are ready to move to the next step.

Step #3: Identify Current Performance

Once desired business results and performance requirements have been identified, the third step is to identify current performance: how employees are currently performing.

We can identify current performance by:

- Monitoring employees
- Interviewing managers
- Reviewing the results of employee work (cases, reports, forms, etc.)



At this point, we are not only looking at the end result of the performance, but we are looking at the elements that contribute to the performance. What is the work environment like? Are expectations clear? Do people have access to information needed to complete the task? Is the connection slow?

We are also looking at ranges of performance. Is everyone working at about the same level? If some people are working more/better/faster than others, what’s the cause?

And we’re beginning to see some of the obstacles that people have in performing as required. And that leads us to our last step in performance consulting.

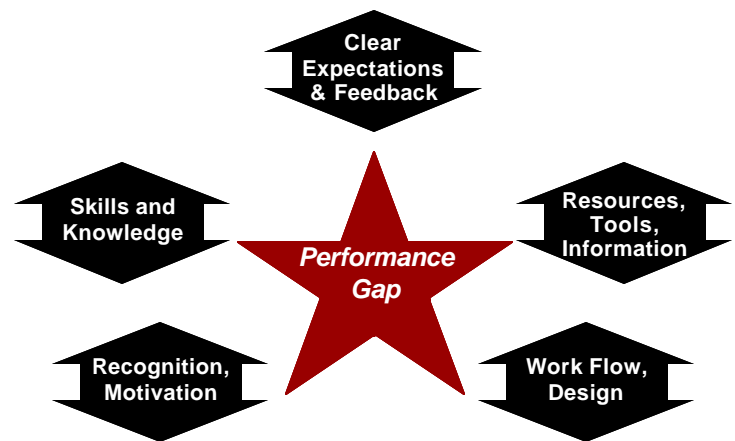
Step #4: Identifying the Performance Gap

We know now the desired business results, the performance that is required for us to achieve our goal, and what performance currently looks like. The fourth step is to identify the gap – and the reasons for the gap – between current performance and required performance.

There are many possible reasons for the gap, each with its own “best” ways of addressing the gap.

When we analyze the performance gap – what people aren’t doing and why they’re not doing it – we look at the five main elements that impact performance.

- Clear expectations and feedback:
Sometimes the reason people aren’t performing as desired is that they didn’t know they were supposed to – expectations were never clearly set. Sometimes they may have done it as they were supposed to but no longer are doing it – they were never given feedback.



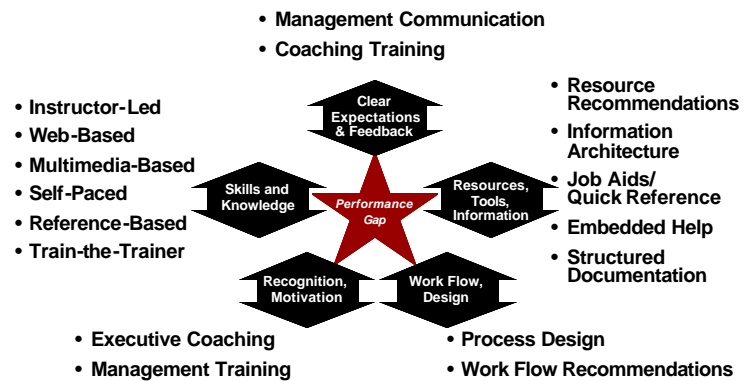
- Resources, tools, information:
These are the things people need to perform. Sometimes it’s a faster computer or a job aid. Sometimes it’s information, or easier access to that information.
- Work flow design: Sometimes performance isn’t as it could be simply because the way the work is carried out could be improved. For example, reducing the number of hands involved sometimes improves performance.
- Recognition and motivation: We all work for different reasons but most of us like to be recognized for doing the work well. We become motivated to work harder. Sometimes the simplest solution to increased performance is a pat on the back.
- Skills and knowledge: Sometimes, performance can only be improved by increasing the capability of the people performing the job. Training – including instructor-led training, web-based training, computer-based training, and self-paced training – can all be effective in increasing the skills and knowledge of employees.

Step #5: Designing Performance Solutions

When designing performance solutions – NOT JUST TRAINING – consider solutions that specifically address each of the five elements impacting performance:

- **Clear expectations and feedback:** Management communications are critical to performance. Sometimes the communication need is a well-crafted document or memo. Sometimes it's a well-designed presentation delivered live or via the web. Sometimes it's a matter of increasing the communication or coaching skill of the manager to help him communicate more effectively with employees.
- **Resources, tools, information:** Suggest resources that will help increase performance. Create job aids and quick reference tools that are especially suited for quick refreshers or to ensure that no steps are missed. Perhaps people perform a task infrequently; rather than force them to memorize the steps, a job aid ensures higher performance. Similarly, structure information – typically found throughout the company in many departments in many formats – employees need so they can access the information they need to do their jobs easily and quickly.
- **Work flow design:** Sometimes performance isn't as it could be simply because the way the work is carried out could be improved. Based on your analysis, recommend improvements to the work flow; sometimes simple changes to who does what can have a significant positive impact on the end result.
- **Recognition and motivation:** Provide executive coaching to help individual executives increase their leadership capability – including their ability to infuse a culture of performance throughout their management team. “Catch someone doing something right – and tell them!”

- **Skills and knowledge:** Often, people need training in order to perform better. Training is appropriate when skill or knowledge needs to be engrained so the processes or principles can be applied in a variety of situations. Training – including instructor-led training, web-based training, computer-based training, and self-paced training – can all be effective in increasing the skills and knowledge of employees. Build training that ensures that participants are able to immediately apply their skills on the job tomorrow and over time. Follow a proven instructional design, include abundant experiential activities for skill building, provide opportunities for practice and feedback, and embed your company's products, services, policies, and other unique details to ensure that the training is transferable to the field.



Trainers are focused primarily on the skills and knowledge element; performance consultants see performance as being impacted by all five elements.

Regardless of your specific role in training – e-learning designer, mentor, graphic illustrator, documentation specialist, trainer – your ultimate contribution to the company is increasing the performance of people in order to positively impact business. Maintaining this perspective in all you do will help you be seen as an integral business partner, not just a trainer.

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