

# Training Employees

## What Do I Need to Know?

*After reading this chapter, you should be able to:*

- L01 Discuss how to link training programs to organizational needs.
- L02 Explain how to assess the need for training.
- L03 Explain how to assess employees' readiness for training.
- L04 Describe how to plan an effective training program.
- L05 Compare widely used training methods.
- L06 Summarize how to implement a successful training program.
- L07 Evaluate the success of a training program.
- L08 Describe training methods for employee orientation and diversity management.

## Introduction

The reason clients turn to Advanced Technology Institute (ATI), a nonprofit organization that helps companies collaborate with schools and government on research and development, is that ATI offers them access to talented experts. In other words, the skills of its people are central to what the organization does. ATI has fewer than 60 employees but that hasn't held back its efforts to find and develop the right talent. Employees hired after the organization's rigorous selection process spend two weeks learning their job requirements, ATI's history and culture, and the use of the company's "knowledge management" system, which gives employees a simple way to post details about what they've learned so that others can look up guidance whenever they need it. ATI also defines career paths for its employees, and each employee works with his or her manager to identify the skills the employee needs to move along that path and plan how to acquire those skills. Employees

who take advantage of the opportunities can go far. Madeleine Fincher started out as a temporary employee, took a job as an assistant to one of the managers, signed up for ATI's training programs, and in a few years had worked her way up to senior program assistant, talking directly with clients in business and government to set up meetings nationwide.<sup>1</sup>

The HR function that helps employees like Fincher increase their value to their organization is training.

**Training** consists of an organization's planned efforts to help employees acquire job-related knowledge, skills, abilities, and behaviors, with the goal of applying these on the job. A training program may range from formal classes to one-on-one mentoring, and it may take place on the job or at remote locations. No matter what its form, training can benefit the organization when it is linked to organizational needs and when it motivates employees.

This chapter describes how to plan and carry out an effective training program. We begin by discussing how to develop effective training in the context of the organization's strategy. Next, we discuss how organizations assess employees' training needs. We then review training methods and the process of evaluating a training program. The chapter concludes by discussing some special applications of training: orientation of new employees and the management of diversity.

### Training

An organization's planned efforts to help employees acquire job-related knowledge, skills, abilities, and behaviors, with the goal of applying these on the job.

**LO1** Discuss how to link training programs to organizational needs.

### Instructional Design

A process of systematically developing training to meet specified needs.

## Training Linked to Organizational Needs

The nature of the modern business environment makes training more important today than it ever has been. Rapid change, especially in the area of technology, requires that employees continually learn new skills. The new psychological contract, described in Chapter 2, has created the expectation that employees invest in their own career development, which requires learning opportunities. Growing reliance on teamwork creates a demand for the ability to solve problems in teams, an ability that often requires formal training. Finally, the diversity of the U.S. population, coupled with the globalization of business, requires that employees be able to work well with people who are different from them. Successful organizations often take the lead in developing this ability.

With training so essential in modern organizations, it is important to provide training that is effective. An effective training program actually teaches what it is designed to teach, and it teaches skills and behaviors that will help the organization achieve its goals. To achieve those goals, HR professionals approach training through **instructional design**—a process of systematically developing training to meet specified needs.<sup>2</sup>

A complete instructional design process includes the steps shown in Figure 7.1. It begins with an assessment of the needs for training—what the organization requires that its people learn. Next, the organization ensures that employees are ready for training in terms of their attitudes, motivation, basic skills, and work environment. The third step is to plan the training program, including the program's objectives, instructors, and methods. The organization then implements the program. Finally, evaluating the results of the training provides feedback for planning future training programs.

To carry out this process more efficiently and effectively, a growing number of organizations are using a **learning management system (LMS)**, a computer application that automates the administration, development, and delivery of a company's training programs.<sup>3</sup>

**Figure 7.1**

Stages of Instructional Design



### Learning Management System (LMS)

A computer application that automates the administration, development, and delivery of training programs.

**L02** Explain how to assess the need for training.

### Needs Assessment

The process of evaluating the organization, individual employees, and employees' tasks to determine what kinds of training, if any, are necessary.

Managers and employees can use the LMS to identify training needs and enroll in courses. LMSs can make training programs more widely available and help companies reduce travel and other costs by providing online training. Administrative tools let managers track course enrollments and program completion. The system can be linked to the organization's performance management system to plan for and manage training needs, training outcomes, and associated rewards together.

## Needs Assessment

Instructional design logically should begin with a **needs assessment**, the process of evaluating the organization, individual employees, and employees' tasks to determine what kinds of training, if any, are necessary. As this definition indicates, the needs assessment answers questions in three broad areas:<sup>4</sup>

1. *Organization*—What is the context in which training will occur?
2. *Person*—Who needs training?
3. *Task*—What subjects should the training cover?

The answers to these questions provide the basis for planning an effective training program.

A variety of conditions may prompt an organization to conduct a needs assessment. Management may observe that some employees lack basic skills or are performing poorly. Decisions to produce new products, apply new technology, or design new jobs should prompt a needs assessment because these changes tend to require new



Pfizer employees go through a representative training phase which teaches them about different Pfizer products and how to market them. Workers typically need to be trained in several processes to work in flexible manufacturing.

skills. The decision to conduct a needs assessment also may be prompted by outside forces, such as customer requests or legal requirements.

The outcome of the needs assessment is a set of decisions about how to address the issues that prompted the needs assessment. These decisions do not necessarily include a training program, because some issues should be resolved through methods other than training. For example, suppose a company uses delivery trucks to transport anesthetic gases to medical facilities, and a driver of one of these trucks mistakenly hooks up the supply line of a mild anesthetic from the truck to the hospital's oxygen system, contaminating the hospital's oxygen supply. This performance problem prompts a needs assessment. Whether or not the hospital decides to provide more training will depend partly on the reasons the driver erred. The driver may have hooked up the supply lines incorrectly because of a lack of knowledge about the appropriate line hookup, anger over a request for a pay raise being denied, or mislabeled valves for connecting the supply lines. Out of these three possibilities, only the lack of knowledge can be corrected through training. Other outcomes of a needs assessment might include plans for better rewards to improve motivation, better hiring decisions, and better safety precautions.

The remainder of this chapter discusses needs assessment and then what the organization should do when assessment indicates a need for training. The possibilities for action include offering existing training programs to more employees; buying or developing new training programs; and improving existing training programs. Before we consider the available training options, let's examine the elements of the needs assessment in more detail.

## Organization Analysis

Usually, the needs assessment begins with the **organization analysis**. This is a process for determining the appropriateness of training by evaluating the characteristics of the organization. The organization analysis looks at training needs in light of the organization's strategy, resources available for training, and management's support for training activities.

Training needs will vary depending on whether the organization's strategy is based on growing or shrinking its personnel, whether it is seeking to serve a broad customer base or focusing on the specific needs of a narrow market segment, and various other strategic scenarios. An organization that concentrates on serving a niche market may need to continually update its workforce on a specialized skills set. A company that is cutting costs with a downsizing strategy may need to train employees who will be laid off in job search skills. The employees who remain following the downsizing may need cross-training so that they can handle a wider variety of responsibilities. For an example of a company where a commitment to training supports corporate strategy, see the "Best Practices" box.

Anyone planning a training program must consider whether the organization has the budget, time, and expertise for training. For example, if the company is installing computer-based manufacturing equipment in one of its plants, it can ensure that it has the necessary computer-literate employees in one of three ways. If it has the technical experts on its staff, they can train the employees affected by the change. Or the company may use testing to determine which of its employees are already computer literate and then replace or reassign employees who lack the necessary skills. The third choice is to purchase training from an outside individual or organization.

### Organization Analysis

A process for determining the appropriateness of training by evaluating the characteristics of the organization.



## Orkin Trains Experts

When people call Orkin, it's generally because they have an unpleasant problem, like ants, cockroaches, or bedbugs. And when people have that kind of problem, they generally just want it to go away. That's where Orkin sees a chance to offer a competitive advantage. As the company's ads say, when you call on Orkin, you "hire an expert."

So where does Orkin get those experts? The company does have a team of entomologists and other scientists with doctorate degrees, but the people who call on homes and companies to get rid of bugs didn't join the company as experts. Rather, they are committed, service-oriented individuals who have taken advantage of the company's extensive training program.

While many employers would say they consider their employees key resources, Orkin backs that claim with training that amounts to "the biggest investment we make in our employees," in the words of David Lamb, Orkin's vice president of learning and media services. New employees participate in three weeks of training that includes watching satellite broadcasts of classes

as well as working with interactive Web-based training materials. The broadcasts originate in a 28,000-square-foot training facility that Orkin built in Atlanta, featuring simulated customer locales: a house, hospital room, restaurant, bar, grocery store, and warehouse. Employees view these realistic setups to understand what they'll need to look for while they're on the job.

After this orientation period, the training continues on the job. Each new employee begins working alongside a certified field trainer, service manager, or branch manager, who observes how the new employee performs. This field trainer quizzes and coaches employees in identifying the particular species of pests they encounter, selecting the best treatment, and explaining their plans to the customer.

Even when employees have learned their job, the training continues. New pests invade, and new treatments are developed, so employees need to continue their training. Orkin's commitment to learning includes inviting entomology professors from major universities to annual meetings, where they can share new ideas with the

company's specialists. The forums are recorded, so employees in the field can watch the videos afterward. Orkin also brings in experts from the Centers for Disease Control and Prevention to inform its employees about health risks related to pests, so that employees can share these lessons with their customers. And in a partnership with the Building Owners and Managers Association, Orkin has developed guidelines for preventing and treating pests in the most environmentally friendly ways that have been identified.

All that training supports Orkin's strategy only if the company verifies that it is covering relevant topics. So staff members from the learning and media services department visit field offices to verify that the training is relevant to the actual issues workers are encountering.

*Sources:* Holly Dolezalek, "Shaper Image," *Training*, November 25, 2009, Business & Company Resource Center, <http://galenet.galegroup.com>; "Green Pest-Control Checklist Available Online," *Buildings*, January 2009, p. 12; and Orkin, Careers Web page, <http://careers.orkin.com>, accessed March 29, 2010.

Even if training fits the organization's strategy and budget, it can be viable only if the organization is willing to support the investment in training. Managers increase the success of training when they support it through such actions as helping trainees see how they can use their newly learned knowledge, skills, and behaviors on the job.<sup>5</sup> Conversely, the managers will be most likely to support training if the people planning it can show that it will solve a significant problem or result in a significant improvement, relative to its cost. Managers appreciate training proposals with specific goals, timetables, budgets, and methods for measuring success.

## Person Analysis

Following the organizational assessment, needs assessment turns to the remaining areas of analysis: person and task. The **person analysis** is a process for determining individuals' needs and readiness for training. It involves answering several questions:

- Do performance deficiencies result from a lack of knowledge, skill, or ability? (If so, training is appropriate; if not, other solutions are more relevant.)
- Who needs training?
- Are these employees ready for training?

The answers to these questions help the manager identify whether training is appropriate and which employees need training. In certain situations, such as the introduction of a new technology or service, all employees may need training. However, when needs assessment is conducted in response to a performance problem, training is not always the best solution.

The person analysis is therefore critical when training is considered in response to a performance problem. In assessing the need for training, the manager should identify all the variables that can influence performance. The primary variables are the person's ability and skills, his or her attitudes and motivation, the organization's input (including clear directions, necessary resources, and freedom from interference and distractions), performance feedback (including praise and performance standards), and positive consequences to motivate good performance. Of these variables, only ability and skills can be affected by training. Therefore, before planning a training program, it is important to be sure that any performance problem results from a deficiency in knowledge and skills. Otherwise, training dollars will be wasted, because the training is unlikely to have much effect on performance.

The person analysis also should determine whether employees are ready to undergo training. In other words, the employees to receive training not only should require additional knowledge and skill, but must be willing and able to learn. (After our discussion of the needs assessment, we will explore the topic of employee readiness in greater detail.)

## Task Analysis

The third area of needs assessment is **task analysis**, the process of identifying the tasks, knowledge, skills, and behaviors that training should emphasize. Usually, task analysis is conducted along with person analysis. Understanding shortcomings in performance usually requires knowledge about the tasks and work environment as well as the employee.

To carry out the task analysis, the HR professional looks at the conditions in which tasks are performed. These conditions include the equipment and environment of the job, time constraints (for example, deadlines), safety considerations, and performance standards. These observations form the basis for a description of work activities, or the tasks required by the person's job. For a selected job, the analyst interviews employees and their supervisors to prepare a list of tasks performed in that job. Then the analyst validates the list by showing it to employees, supervisors, and other subject-matter experts and asking them to complete a questionnaire about the importance, frequency, and difficulty of the tasks. Table 7.1 is an example of a task analysis questionnaire for an electrical maintenance worker. For each task listed, the subject-matter expert uses the scales to rate the task's importance, frequency, and difficulty.

### Person Analysis

A process of determining individuals' needs and readiness for training.

### Task Analysis

The process of identifying and analyzing tasks to be trained for.

Table 7.1

## Sample Items from a Task Analysis Questionnaire

Job: Electrical Maintenance Worker				
Task Performance Ratings				
Task #s	Task Description	Frequency of Performance	Importance	Difficulty
199-264	Replace a light bulb	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
199-265	Replace an electrical outlet	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
199-266	Install a light fixture	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
199-267	Replace a light switch	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
199-268	Install a new circuit breaker	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
		<b>Frequency of Performance</b> 0=never 5=often	<b>Importance</b> 1=negligible 5=extremely high	<b>Difficulty</b> 1=easiest 5=most difficult

SOURCE: From E. F. Holton III and C. Bailey, "Top-to-Bottom Curriculum Redesign," *Training and Development*, March 1995, pp. 40–44. Copyright © 1995 by American Society for Training and Development. Reproduced with permission of American Society for Training and Development via Copyright Clearance Center.

The information from these questionnaires is the basis for determining which tasks will be the focus of the training. The person or committee conducting the needs assessment must decide what levels of importance, frequency, and difficulty signal a need for training. Logically, training is most needed for tasks that are important, frequent, and at least moderately difficult. For each of these tasks, the analysts must identify the knowledge, skills, and abilities required to perform the task. This information usually comes from interviews with subject-matter experts, such as employees who currently hold the job.

**L03** Explain how to assess employees' readiness for training.

### Readiness for Training

A combination of employee characteristics and positive work environment that permit training.

## Readiness for Training

Effective training requires not only a program that addresses real needs, but also a condition of employee readiness. **Readiness for training** is a combination of employee characteristics and positive work environment that permit training. The necessary employee characteristics include ability to learn the subject matter, favorable attitudes toward the training, and motivation to learn. A positive work environment is one that encourages learning and avoids interfering with the training program.

### Employee Readiness Characteristics

To be ready to learn, employees need basic learning skills, especially *cognitive ability*, which includes being able to use written and spoken language, solve math problems, and use logic to solve problems. Ideally, the selection process identified job candidates

with enough cognitive ability to handle not only the requirements for doing a job but also the training associated with that job. However, recent forecasts of the skill levels of the U.S. workforce indicate that many companies will have to work with employees who lack basic skills.<sup>6</sup> For example, they may have to provide literacy training or access to classes teaching basic skills before some employees can participate in job-related training.

Employees learn more from training programs when they are highly motivated to learn—that is, when they really want to learn the content of the training program.<sup>7</sup> Employees tend to feel this way if they believe they are able to learn, see potential benefits from the training program, are aware of their need to learn, see a fit between the training and their career goals, and have the basic skills needed for participating in the program. Managers can influence a ready attitude in a variety of ways. For example, they can provide feedback that encourages employees, establishes rewards for learning, and communicates with employees about the organization's career paths and future needs.

## Work Environment

Readiness for training also depends on two broad characteristics of the work environment: situational constraints and social support.<sup>8</sup> *Situational constraints* are the limits on training's effectiveness that arise from the situation or the conditions within the organization. Constraints can include a lack of money for training, lack of time for training or practicing, and failure to provide proper tools and materials for learning or applying the lessons of training. Conversely, trainees are likely to apply what they learn if the organization gives them opportunities to use their new skills and if it rewards them for doing so.<sup>9</sup>

*Social support* refers to the ways the organization's people encourage training, including giving trainees praise and encouraging words, sharing information about participating in training programs, and expressing positive attitudes toward the organization's training programs. Table 7.2 summarizes some ways in which managers can support training.

Support can also come from employees' peers. The organization can formally provide peer support by establishing groups of employees who meet regularly to discuss their progress. For example, group members can share how they coped with challenges related to what they learned. Schlumberger, which provides oil field services,

Understand the content of the training.
Know how training relates to what you need employees to do.
In performance appraisals, evaluate employees on how they apply training to their jobs.
Support employees' use of training when they return to work.
Ensure that employees have the equipment and technology needed to use training.
Prior to training, discuss with employees how they plan to use training.
Recognize newly trained employees who use training content.
Give employees release time from their work to attend training.
Explain to employees why they have been asked to attend training.
Give employees feedback related to skills or behavior they are trying to develop.

**Table 7.2**

**What Managers Should Do to Support Training**

SOURCE: Based on A. Rossett, "That Was a Great Class, but ..." *Training and Development*, July 1997, p. 21.

sets up online “communities of practice,” where geologists, physicists, managers, engineers, and other employees around the world can trade knowledge to solve problems.<sup>10</sup> Another way to encourage peer support is for the human resource department or others to publish a newsletter with articles relevant to training, perhaps including interviews with employees who successfully applied new skills. Finally, the organization can assign experienced employees as mentors to trainees, providing advice and support.

**L04** Describe how to plan an effective training program.

## Planning the Training Program

Decisions about training are often the responsibility of a specialist in the organization’s training or human resources department. When the needs assessment indicates a need for training and employees are ready to learn, the person responsible for training should plan a training program that directly relates to the needs identified. Planning begins with establishing objectives for the training program. Based on those objectives, the planner decides who will provide the training, what topics the training will cover, what training methods to use, and how to evaluate the training.

### Objectives of the Program

Formally establishing objectives for the training program has several benefits. First, a training program based on clear objectives will be more focused and more likely to succeed. In addition, when trainers know the objectives, they can communicate them to the employees participating in the program. Employees learn best when they know what the training is supposed to accomplish. Finally, down the road, establishing objectives provides a basis for measuring whether the program succeeded, as we will discuss later in this chapter.

Effective training objectives have several characteristics:

- They include a statement of what the employee is expected to do, the quality or level of performance that is acceptable, and the conditions under which the employee is to apply what he or she learned (for instance, physical conditions, mental stresses, or equipment failure).<sup>11</sup>
- They include performance standards that are measurable.
- They identify the resources needed to carry out the desired performance or outcome. Successful training requires employees to learn but also employers to provide the necessary resources.

A related issue at the outset is who will participate in the training program. Some training programs are developed for all employees of the organization or all members of a team. Other training programs identify individuals who lack desirable skills or have potential to be promoted, then provide training in the areas of need that are identified for the particular employees. When deciding whom to include in training, the organization has to avoid illegal discrimination. The organization should not—intentionally or unintentionally—exclude members of protected groups, such as women, minorities, and older employees. During the training, all participants should receive equal treatment, such as equal opportunities for practice. In addition, the training program should provide reasonable accommodation for trainees with disabilities. The kinds of accommodations that are appropriate will vary according to

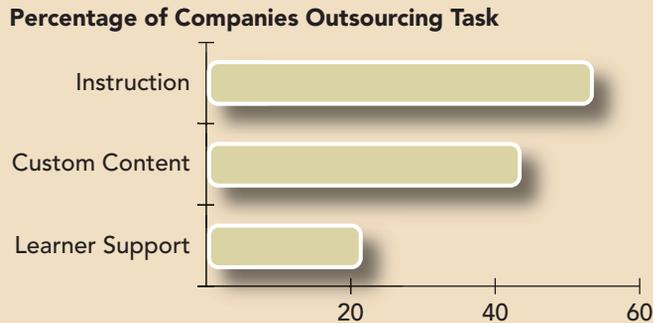
# Did You Know?

## Many Companies Outsource Training Tasks

A recent survey of U.S.-based corporations found that over half were outsourcing the instruction

of training courses. Four out of ten said they used outside experts to create custom content.

Source: "Training 2009 Industry Report," *Training*, November/December 2009, pp. 32–36.



the type of training and type of disability. One employee might need an interpreter, whereas another might need to have classroom instruction provided in a location accessible to wheelchairs.

### In-House or Contracted Out?

An organization can provide an effective training program, even if it lacks expertise in training. As shown in the “Did You Know?” box, many organizations use outside experts to develop and instruct training courses. Many companies and consultants provide training services to organizations. Community colleges often work with employers to train employees in a variety of skills.

To select a training service, an organization can mail several vendors a *request for proposal (RFP)*, which is a document outlining the type of service needed, the type and number of references needed, the number of employees to be trained, the date by which the training is to be completed, and the date by which proposals should be received. A complete RFP also indicates funding for the project and the process by which the organization will determine its level of satisfaction. Putting together a request for proposal is time consuming but worthwhile because it helps the organization clarify its objectives, compare vendors, and measure results.

Vendors that believe they are able to provide the services outlined in the RFP submit proposals that provide the types of information requested. The organization reviews the proposals to eliminate any vendors that do not meet requirements and to compare the vendors that do qualify. They check references and select a candidate, based on the proposal and the vendor’s answers to questions about its experience, work samples, and evidence that its training programs meet objectives.

The cost of purchasing training from a contractor can vary substantially. In general, it is much costlier to purchase specialized training that is tailored to the organization’s unique requirements than to participate in a seminar or training course that teaches general skills or knowledge. Preparing a specialized training program can require a

significant investment of time for material the consultant won't be able to sell to other clients. Not surprisingly then, in tight economic times, companies have been shrinking the proportion of their training dollars spent on programs prepared by contractors. This has helped them lower the cost per hour of their training programs.<sup>12</sup>

Even in organizations that send employees to outside training programs, someone in the organization may be responsible for coordinating the overall training program. Called *training administration*, this is typically the responsibility of a human resources professional. Training administration includes activities before, during, and after training sessions.

## Choice of Training Methods

Whether the organization prepares its own training programs or buys training from other organizations, it is important to verify that the content of the training relates directly to the training objectives. Relevance to the organization's needs and objectives ensures that training money is well spent. Tying training content closely to objectives also improves trainees' learning, because it increases the likelihood that the training will be meaningful and helpful.

After deciding on the goals and content of the training program, planners must decide how the training will be conducted. As we will describe in the next section, a wide variety of methods is available. Training methods fall into the broad categories described in Table 7.3: presentation, hands-on, and group-building methods.

Training programs may use these methods alone or in combination. In general, the methods used should be suitable for the course content and the learning abilities of the participants. The following section explores the options in greater detail.

**LO5** Compare widely used training methods.

## Training Methods

A wide variety of methods is available for conducting training. Figure 7.2 shows the percentage of learner hours delivered to employees by each of several methods: instructor-led classrooms, online self-study, virtual classrooms, and other methods, including workbooks and videos. These other methods are being phased out at most companies as more and more training moves to Internet applications. As a result, today most training programs are taking place in a virtual or face-to-face classroom or using a combination of instructor-led and technology-based methods (blended methods).<sup>13</sup>

**Table 7.3**  
Categories of Training Methods

METHOD	TECHNIQUES	APPLICATIONS
<i>Presentation methods:</i> trainees receive information provided by others	Lectures, workbooks, CD-ROMs, DVDs, podcasts, Web sites	Conveying facts or comparing alternatives
<i>Hands-on methods:</i> trainees are actively involved in trying out skills	On-the-job training, simulations, role-plays, computer games	Teaching specific skills; showing how skills are related to job or how to handle interpersonal issues
<i>Group-building methods:</i> trainees share ideas and experiences, build group identities, learn about interpersonal relationships and the group	Group discussions, experiential programs, team training	Establishing teams or work groups; managing performance of teams or work groups

Percentage of Student Hours Delivered by Each Training Method

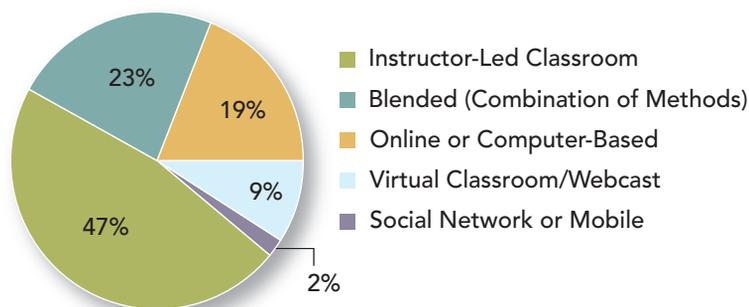


Figure 7.2

Use of Instructional Methods

SOURCE: "Training 2009 Industry Report," *Training*, November/December 2009, pp. 32–36.

## Classroom Instruction

At school, we tend to associate learning with classroom instruction, and that type of training is most widely used in the workplace, too. Classroom instruction typically involves a trainer lecturing a group. Trainers often supplement lectures with slides, discussions, case studies, question-and-answer sessions, and role playing. Actively involving trainees enhances learning.

When the course objectives call for presenting information on a specific topic to many trainees, classroom instruction is one of the least expensive and least time-consuming ways to accomplish that goal. Learning will be more effective if trainers enhance lectures with job-related examples and opportunities for hands-on learning. For more ideas on creating presentations that meet course objectives, see the "HR How To" box.

Modern technology has expanded the notion of the classroom to classes of trainees scattered in various locations. With *distance learning*, trainees at different locations attend programs online, using their computers to view lectures, participate in discussions, and share documents. Technology applications in distance learning may include videoconferencing, e-mail, instant messaging, document-sharing software, and Web cameras. General Mills uses these virtual classrooms at its smaller facilities, where offering a class on site is not cost-effective. Employees can sign up for online courses about specific products, general technical skills, and work functions such as maintenance procedures.<sup>14</sup>

Distance learning provides many of the benefits of classroom training without the cost and time of travel to a shared classroom. The major disadvantage of distance learning is that interaction between the trainer and audience may be limited. To overcome this hurdle, distance learning usually provides a communications link between trainees and trainer. Also, on-site instructors or facilitators should be available to answer questions and moderate question-and-answer sessions.

## Audiovisual Training

Presentation methods need not require trainees to attend a class. Trainees can also work independently, using course material prepared on CDs and DVDs or in workbooks. Audiovisual techniques such as overhead transparencies, PowerPoint or other presentation software, and videos or audio clips can also supplement classroom instruction.

## DEVELOPING EFFECTIVE CLASSROOM PRESENTATIONS

What separates a boring lecture from an attention-grabbing presentation that helps you learn? Here are some ideas for developing a classroom presentation that gets results:

- *Build rapport and two-way communication from the very beginning.* As participants arrive, introduce yourself, learn names, and show you're interested in the people who are there. Lead off with a question that invites discussion.
- *Remember the real purpose.* The presentation should cover knowledge and skills participants can apply at work, not just facts for them to memorize. As you consider what to include, imagine participants hearing you and asking, "So what? How can I use this?" Then tailor the presentation to answer those questions.
- *Use PowerPoint thoughtfully.* It's easy to write a list of key points, but that doesn't take advantage of the major strength of presentation

software: the chance to convey ideas visually. Before you opt for bullet points, think about ways to interest the audience with a photograph or drive a point home with a graph. For example, one of the first slides could be a flow chart showing how the ideas in the presentation are related to each other and to the objectives for the course. As the presentation progresses, you can provide additional images to illustrate which part of the flow you're covering. At the end, another graph (a "concept map") could show relationships among the pieces of knowledge, relating them to each other and to participants' real-world applications.

- *Use multimedia as appropriate.* If you can embed relevant music, video clips, or other media into your presentation, the effort can engage participants more fully than just words on a screen.
- *Invite discussion.* The use of discussions helps participants

take the general ideas and apply them to their specific situations. When they get involved in this way, participants not only are more likely to remember what they learned, they also are in a stronger position to *use* what they learned. If participants don't have questions, the presenter should have some ready—even as simple as a pop quiz about what was just covered.

- *Introduce role playing.* If the topic involves ways that people interact, a role-play is an excellent way for you to demonstrate and for the participants to practice the skills being taught.

*Sources:* Carmine Gallo, "Improve Your Employee Training Sessions," *BusinessWeek*, February 2, 2010, <http://www.businessweek.com>; Emanuel Albu, "Presenting Course Outlines in a Flow Chart Format," *T&D*, February 2010, pp. 76–77; and Mark Magnacca, "Do You Have a 'So What' Mindset?" *T&D*, November 2009, pp. 66–67.

Some technologies make audiovisual training available as podcasts on portable devices such as PDAs and iPods or other portable audio players. As video-enabled devices become more widespread, the use of video files is likely to grow. At Capital One, employees enrolled in training courses receive iPods. They can download programs on topics such as leadership, conflict management, and customer service. To make the audio programs more engaging, some are written in the format of a radio call-in show. In classroom programs, role-play and other exercises are recorded and then made available for download to trainees' iPods.<sup>15</sup> Challenges of using podcasts for learning include ensuring that employees know when and how to use the technology, encouraging collaboration and interaction among trainees, and ensuring that employees can obtain the necessary downloads from their particular location and with their mobile device.<sup>16</sup>

Users of audiovisual training often have some control over the presentation. They can review material and may be able to slow down or speed up the lesson. Videos can

show situations and equipment that cannot be easily demonstrated in a classroom. Another advantage of audiovisual presentations is that they give trainees a consistent presentation, not affected by an individual trainer's goals and skills. The problems associated with these methods may include their trying to present too much material, poorly written dialogue, overuse of features such as humor or music, and drama that distracts from the key points. A well-written and carefully produced video can overcome these problems.

## Computer-Based Training

Although almost all organizations use classroom training, new technologies are gaining in popularity as technology improves and becomes cheaper. With computer-based training, participants receive course materials and instruction distributed over the Internet or on CD-ROM. Often, these materials are interactive, so participants can answer questions and try out techniques, with course materials adjusted according to participants' responses. Online training programs may allow trainees to submit questions via e-mail and to participate in online discussions. Multimedia capabilities enable computers to provide sounds, images, and video presentations, along with text.

Computer-based training is generally less expensive than putting an instructor in a classroom of trainees.<sup>17</sup> The low cost to deliver information gives the company flexibility in scheduling training, so that it can fit around work requirements. Training can be delivered in smaller doses, so material is easier to remember. Trainees often appreciate the multimedia capabilities, which appeal to several senses, and the chance to learn from experts anywhere in the world. Finally, it is easier to customize computer-based training for individual learners.

Current applications of computer-based training can extend its benefits:

- **E-learning** involves receiving training via the Internet or the organization's intranet, typically through some combination of Web-based training modules, distance learning, and virtual classrooms. E-learning uses electronic networks for delivering and sharing information, and it offers tools and information for helping trainees improve performance. Training programs may include links to other online information resources and to trainees and experts for collaboration on problem solving. The e-learning system may also process enrollments, test and evaluate participants, and monitor progress. Ritz Camera Centers uses e-learning to build selling skills and keep employees up-to-date on product information. With employees widely dispersed among its stores and working different hours, e-learning makes training available to everyone and verifies (through online quizzes at the end of each module) that employees are learning.<sup>18</sup>
- *Electronic performance support systems (EPSSs)* provide access to skills training, information, and expert advice when a problem occurs on the job.<sup>19</sup> As employees need to learn new skills, they can use the EPSS, which gives them access to the particular information they need, such as detailed instructions on how to perform an unfamiliar task. Using an EPSS is faster and more relevant than attending classes, even classes offered online.



Mobile technology is useful not only for entertainment, but can also be used for employees who travel and need to be in touch with the office. iPods and Smartphones also give employees the ability to listen to and participate in training programs at their own leisure.

### E-Learning

Receiving training via the Internet or the organization's intranet.

## TRAINING GETS MOBILE

Just as the widespread adoption of personal computers brought training to employees' desks, now the greater capabilities of wireless devices are bringing training pretty much anywhere employees can get a signal on their cell phone or PDA. Content can include anything these devices can download: alerts, study aids, audio and video clips, and interactive practices and tests.

For Allison Hickey, director and program manager of consultant Accenture's national security services practices, receiving training on her BlackBerry is huge.

Juggling work and family responsibilities, Hickey had struggled to carve out time to sit down at a computer and complete a training module. The mobile training divides training programs into handy ten-minute chunks that Accenture executives can squeeze in when they step out for a lunch break or while waiting for a boarding call at the airport. At the end of each course is a quiz that participants complete and transmit back to Accenture's learning management system to verify they have learned the mandatory lessons.

Users of mobile learning praise the approach. Employees love the convenience. Merrill Lynch says participants in its mobile learning program complete their courses faster than through traditional e-learning, boosting their personal productivity by saving hours of training time every year.

*Sources:* Sarah Boehle, "Mobile Training: Don't Leave Home without Your BlackBerry," *Training*, September 21, 2009, Business & Company Resource Center, <http://galenet.galegroup.com>; and Judy Brown, "Can You Hear Me Now?" *T&D*, February 2010, Business & Company Resource Center, <http://galenet.galegroup.com>.

The best e-learning combines the advantages of the Internet with the principles of a good learning environment. It takes advantage of the Web's dynamic nature and ability to use many positive learning features, including hyperlinks to other training sites and content, control by the trainee, and ability for trainees to collaborate.

### On-the-Job Training

Although people often associate training with classrooms, much learning occurs while employees are performing their jobs. **On-the-job training (OJT)** refers to training methods in which a person with job experience and skill guides trainees in practicing job skills at the workplace. This type of training takes various forms, including apprenticeships and internships.

An **apprenticeship** is a work-study training method that teaches job skills through a combination of structured on-the-job training and classroom training. The OJT component of an apprenticeship involves the apprentice assisting a certified tradesperson (a journeyman) at the work site. Typically, the classroom training is provided by local trade schools, high schools, and community colleges. Government requirements for an apprenticeship program vary by occupation, but programs generally range from one to six years, with each year including 2,000 hours of on-the-job training plus at least 144 hours of classroom instruction.<sup>20</sup> Some apprenticeship programs are sponsored by individual companies, others by employee unions. As shown in the left column of Table 7.4, most apprenticeship programs are in the skilled trades, such as plumbing, carpentry, and electrical work. For trainees, a major advantage of apprenticeship is the ability to earn an income while learning a trade. In addition, training through an apprenticeship is usually effective because it involves hands-on learning and extensive practice. At its manufacturing facility in Toledo, Ohio, Libbey

#### On-the-job Training (OJT)

Training methods in which a person with job experience and skill guides trainees in practicing job skills at the workplace.

#### Apprenticeship

A work-study training method that teaches job skills through a combination of on-the-job training and classroom training.

APPRENTICESHIP	INTERNSHIP
Bricklayer	Accountant
Carpenter	Doctor
Electrician	Journalist
Plumber	Lawyer
Printer	Nurse
Welder	

Table 7.4

Typical Jobs for  
Apprentices and Interns

Glass has apprenticeship programs in mold making, machine repair, millwrighting, and maintenance repair.<sup>21</sup> The program develops employees who are open to change, enables Libbey to use employees rather than outsource work, helps the company attract ambitious workers, and lets the company tailor training and work experiences to meet its specific needs.

An **internship** is on-the-job learning sponsored by an educational institution as a component of an academic program. The sponsoring school works with local employers to place students in positions where they can gain experience related to their area of study. For example, Indiana University–Purdue University Fort Wayne (IPFW) has partnered with Sweetwater Sound to expand IPFW’s music technology program. Sweetwater, which combines recording services at its headquarters with a giant music retailing business, offers internships to juniors and seniors in the music technology program. In addition, IPFW and Sweetwater share facilities, and experts from Sweetwater serve as adjunct professors, teaching film scoring, recording arts, and other courses.<sup>22</sup> Many internships prepare students for professions such as those listed in the right column of Table 7.4.

### Internship

On-the-job learning sponsored by an educational institution as a component of an academic program.

To be effective, OJT programs should include several characteristics:

- The organization should issue a policy statement describing the purpose of OJT and emphasizing the organization’s support for it.
- The organization should specify who is accountable for conducting OJT. This accountability should be included in the relevant job descriptions.
- The organization should review OJT practices at companies in similar industries.
- Managers and peers should be trained in OJT principles.
- Employees who conduct OJT should have access to lesson plans, checklists, procedure manuals, training manuals, learning contracts, and progress report forms.
- Before conducting OJT with an employee, the organization should assess the employee’s level of basic skills.<sup>23</sup>

## Simulations

A **simulation** is a training method that represents a real-life situation, with trainees making decisions resulting in outcomes that mirror what would happen on the job. Simulations enable trainees to see the impact of their decisions in an artificial, risk-free environment. They are used for teaching production and process skills as well as management and interpersonal skills. Simulations used in training include call centers stocked with phones and reference materials, as well as mockups of houses used for training cable installers.

Simulators must have elements identical to those found in the work environment. The simulator needs to respond exactly as equipment would under the conditions and

### Simulation

A training method that represents a real-life situation, with trainees making decisions resulting in outcomes that mirror what would happen on the job.

response given by the trainee. For this reason, simulators are expensive to develop and need constant updating as new information about the work environment becomes available. Still, they are an excellent training method when the risks of a mistake on the job are great. Trainees do not have to be afraid of the impact of wrong decisions when using the simulator, as they would be with on-the-job training. Also, trainees tend to be enthusiastic about this type of learning and to learn quickly, and the lessons are generally related very closely to job performance. Given these benefits, this training method is likely to become more widespread as its development costs fall into a range more companies can afford.<sup>24</sup>

When simulations are conducted online, trainees often participate by creating **avatars**, or computer depictions of themselves, which they manipulate onscreen to play roles as workers or other participants in a job-related situation. Stapoil, a Norwegian oil company, has an oil platform in Second Life that allows trainees' avatars to walk around it. Stapoil uses the oil platform for safety training. It catches fire, and employees have to find lifeboats to exit the platform safely.<sup>25</sup>

**Virtual reality** is a computer-based technology that provides an interactive, three-dimensional learning experience. Using specialized equipment or viewing the virtual model on a computer screen, trainees move through the simulated environment and interact with its components. Devices relay information from the environment to the trainees' senses. For example, audio interfaces, gloves that provide a sense of touch, treadmills, or motion platforms create a realistic but artificial environment. Devices also communicate information about the trainee's movements to a computer.

Virtual reality applications are as diverse as surgery and welding.<sup>26</sup> In the simulated environment being constructed at the Jump Trading Simulation and Conference Education Center at OSF Saint Francis Medical Center in Peoria, Illinois, doctors will manipulate computerized surgical instruments as they practice new procedures on mannequins. In industry, students learning to weld can practice with a virtual welding system called VRTEX 360, which uses monitors on a virtual welding gun and helmet to gather data for feedback after training exercises are complete. The VRTEX 360 not only offers a safe and economical alternative to real welding projects, but it also is eco-friendly, because it reduces consumption of electricity and welding materials.

## Business Games and Case Studies

Training programs use business games and case studies to develop employees' management skills. A case study is a detailed description of a situation that trainees study and discuss. Cases are designed to develop higher-order thinking skills, such as the ability to analyze and evaluate information. They also can be a safe way to encourage trainees to take appropriate risks, by giving them practice in weighing and acting on uncertain outcomes. There are many sources of case studies, including Harvard Business School, the Darden Business School at the University of Virginia, and McGraw-Hill publishing company.

With business games, trainees gather information, analyze it, and make decisions that influence the outcome of the game. For instance, managers at NetApp participated in a game where they assumed the roles of the top executives of an imaginary company (modeled after NetApp). Five-person teams competed to produce the greatest sales and profits as the game presented them with one challenge after another. At the end of the simulation, the participants discussed the impact of the decisions

### Avatars

Computer depictions of trainees, which the trainees manipulate in an online role-play.

### Virtual Reality

A computer-based technology that provides an interactive, three-dimensional learning experience.



they had made along the way.<sup>27</sup> Games stimulate learning because they actively involve participants and mimic the competitive nature of business. A realistic game may be more meaningful to trainees than presentation techniques such as classroom instruction.

Training with case studies and games requires that participants come together to discuss the cases or the progress of the game. This requires face-to-face or electronic meetings. Also, participants must be willing to be actively involved in analyzing the situation and defending their decisions.

## Behavior Modeling

Research suggests that one of the most effective ways to teach interpersonal skills is through behavior modeling.<sup>28</sup> This involves training sessions in which participants observe other people demonstrating the desired behavior, then have opportunities to practice the behavior themselves. For example, a training program could involve several days of four-hour sessions, each focusing on one interpersonal skill, such as communicating or coaching. At the beginning of each session, participants hear the reasons for using the key behaviors; then they watch a video of a model performing the key behaviors. They practice through role-playing and receive feedback about their performance. In addition, they evaluate the performance of the model in the video and discuss how they can apply the behavior on the job.

## Experiential Programs

To develop teamwork and leadership skills, some organizations enroll their employees in a form of training called **experiential programs**. In experiential programs, participants learn concepts and then apply them by simulating the behaviors involved and analyzing the activity, connecting it with real-life situations.<sup>29</sup> In France, some businesses are signing up their managers to attend cooking schools, where they whip up a gourmet meal together. Jacques Bally, who works for a school run by one of France's top chefs, says cooking is a great way to learn teamwork: "It's like in any squad, everyone is responsible for playing their part; they have their own tasks but a common objective—and if they want to eat in the end, then they have to get the meal ready."<sup>30</sup>

Experiential training programs should follow several guidelines. A program should be related to a specific business problem. Participants should feel challenged and move outside their comfort zones but within limits that keep their motivation strong and help them understand the purpose of the program.

One form of experiential program, called **adventure learning**, uses challenging, structured outdoor activities, which may include difficult sports such as dogsledding or mountain climbing. Other activities may be structured tasks like climbing walls, completing rope courses, climbing ladders, or making "trust falls" (in which each trainee stands on a table and falls backward into the arms of other group members).

The impact of adventure learning programs has not been rigorously tested, but participants report they gained a greater understanding of themselves and the ways they interact with their co-workers. One key to the success of such programs may be that the organization insist that entire work groups participate together. This encourages people to see, discuss, and correct the kinds of behavior that keep the group from performing well. The "HR Oops!" box shows one potential limitation of adventure learning.

### Experiential Programs

Training programs in which participants learn concepts and apply them by simulating behaviors involved and analyzing the activity, connecting it with real-life situations.

### Adventure Learning

A teamwork and leadership training program based on the use of challenging, structured outdoor activities.



One of the most important features of organizations today is teamwork. Experiential programs include team-building exercises like wall climbing and rafting to help build trust and cooperation among employees.

Before requiring employees to participate in experiential programs, the organization should consider the possible drawbacks. Because these programs are usually physically demanding and often require participants to touch each other, companies face certain risks. Some employees may be injured or may feel that they were sexually harassed or that their privacy was invaded. Also, the Americans with Disabilities Act (discussed in Chapter 3) raises questions about requiring employees with disabilities to participate in physically demanding training experiences.

## Team Training

### Cross-Training

Team training in which team members understand and practice each other's skills so that they are prepared to step in and take another member's place.

### Coordination Training

Team training that teaches the team how to share information and make decisions to obtain the best team performance.

A possible alternative to experiential programs is team training, which coordinates the performance of individuals who work together to achieve a common goal. An organization may benefit from providing such training to groups when group members must share information and group performance depends on the performance of the individual group members. Examples include the military, nuclear power plants, and commercial airlines. In those work settings, much work is performed by crews, groups, or teams. Success depends on individuals' coordinating their activities to make decisions, perhaps in dangerous situations.

Ways to conduct team training include cross-training and coordination training.<sup>31</sup> In **cross-training**, team members understand and practice each other's skills so that they are prepared to step in and take another member's place. In a factory, for example, production workers could be cross-trained to handle all phases of assembly. This enables the company to move them to the positions where they are most needed to complete an order on time.

**Coordination training** trains the team in how to share information and decisions to obtain the best team performance. This type of training is especially important for commercial aviation and surgical teams. Both of these kinds of teams must

# HR Oops!

## When Training Crashes

Edy Greenblatt conducts adventure training in which participants experience how a team of four people must work together to put on a performance on the flying trapeze. Everyone learns firsthand how hard it is to listen while swinging high above the ground and wondering if they'll fall.

While Greenblatt has seen her clients learn a lot about teamwork under pressure, she also has seen and heard about the limits of adventure training. She recalls that one team of trainees told her about an earlier outing with a boss whose leadership they doubted. The training exercise only reinforced their doubts.

The boss became terrified and started crying, and the team concluded, "He's the loser we thought he was."

Trainer Linda Henman doesn't even bother recommending adventure learning anymore. She says when groups would spend the morning learning teamwork skills with her, then move to a park for an afternoon of practicing teamwork through wilderness navigation, they would return complaining that the time outside had been wasted. They preferred a focus on work-related issues.

Source: Based on Holly Dolezalek, "Extreme Training," *Training*, January

20, 2010, Business & Company Resource Center, <http://galenet.galegroup.com>.

### Questions

1. Given the criticisms of adventure learning, why do you think it remains an attractive option to some? Would you want to participate in one of these training programs? Why or why not?
2. Imagine that you are an HR manager in a company where an executive wants to sign the sales team up for adventure learning. What steps could you take to increase the likelihood that the effort will benefit the organization?

monitor different aspects of equipment and the environment at the same time sharing information to make the most effective decisions regarding patient care or aircraft safety and performance.

To improve the performance of its ramp employees, United Airlines arranged for them to attend Pit Instruction & Training, near Charlotte, North Carolina. The training program uses a quarter-mile racetrack and pit road to train NASCAR pit crews, but it also provides team training to companies that want their teams to work as efficiently together as a NASCAR pit crew. In United's training program, the ramp workers actually work on race cars—changing tires, filling gas tanks, and so on. The trainers take videos, time them, and deliver feedback on their performance as they face challenges such as staff shortages or a parking spot strewn with lug nuts. The goal is for the ramp workers to develop skills in organizing, communicating, and standardizing their work.<sup>32</sup>

Training may also target the skills needed by the teams' leaders. **Team leader training** refers to training people in the skills necessary for team leadership. For example, the training may be aimed at helping team leaders learn to resolve conflicts or coordinate activities.

## Action Learning

Another form of group building is **action learning**. In this type of training, teams or work groups get an actual problem, work on solving it and commit to an action plan, and are accountable for carrying out the plan.<sup>33</sup> Ideally, the project is one for which the efforts and results will be visible not only to participants but also to others

### Team Leader Training

Training in the skills necessary for effectively leading the organization's teams.

### Action Learning

Training in which teams get an actual problem, work on solving it and commit to an action plan, and are accountable for carrying it out.

in the organization. The visibility and impact of the task are intended to make participation exciting, relevant, and engaging. At General Electric, action learning has included projects aimed at analyzing the market potential of various countries with fast-developing markets. To heighten the learning, organizations can get their best leaders involved as mentors and coaches to the participants.

The effectiveness of action learning has not been formally evaluated. This type of training seems to result in a great deal of learning, however, and employees are able to apply what they learn because action learning involves actual problems the organization is facing. The group approach also helps teams identify behaviors that interfere with problem solving.

**L06** Summarize how to implement a successful training program.

## Implementing the Training Program: Principles of Learning

Learning permanently changes behavior. For employees to acquire knowledge and skills in the training program and apply what they have learned in their jobs, the training program must be implemented in a way that applies what we know about how people learn. Researchers have identified a number of ways employees learn best.<sup>34</sup> Table 7.5 summarizes ways that training can best encourage learning. In general, effective training communicates learning objectives clearly, presents information in distinctive and memorable ways, and helps trainees link the subject matter to their jobs.

Employees are most likely to learn when training is linked to their current job experiences and tasks.<sup>35</sup> There are a number of ways trainers can make this link. Training sessions should present material using familiar concepts, terms, and examples. As far as possible, the training context—such as the physical setting or the images presented on a computer—should mirror the work environment. Along with physical elements, the context should include emotional elements. In the earlier example of training store personnel to handle upset customers, the physical context is more relevant if it includes trainees acting out scenarios of personnel dealing with unhappy customers. The role-play interaction between trainees adds emotional realism and further enhances learning.

To fully understand and remember the content of the training, employees need a chance to demonstrate and practice what they have learned. Trainers should provide ways to actively involve the trainees, have them practice repeatedly, and have them complete tasks within a time that is appropriate in light of the learning objectives. Practice requires physically carrying out the desired behaviors, not just describing them. Practice sessions could include role-playing interactions, filling out relevant forms, or operating machinery or equipment to be used on the job. The more the trainee practices these activities, the more comfortable he or she will be in applying the skills on the job. People tend to benefit most from practice that occurs over several sessions, rather than one long practice session.<sup>36</sup> For complex tasks, it may be most effective to practice a few skills or behaviors at a time, then combine them in later practice sessions.

Trainees need to understand whether or not they are succeeding. Therefore, training sessions should offer feedback. Effective feedback focuses on specific behaviors and is delivered as soon as possible after the trainees practice or demonstrate what they have learned.<sup>37</sup> One way to do this is to videotape trainees, then show the video while indicating specific behaviors that do or do not match the desired outcomes of

TRAINING ACTIVITY	WAYS TO PROVIDE TRAINING ACTIVITY
Communicate the learning objective.	Demonstrate the performance to be expected. Give examples of questions to be answered.
Use distinctive, attention-getting messages.	Emphasize key points. Use pictures, not just words.
Limit the content of training.	Group lengthy material into chunks. Provide a visual image of the course material. Provide opportunities to repeat and practice material.
Guide trainees as they learn.	Use words as reminders about sequence of activities. Use words and pictures to relate concepts to one another and to their context. Prompt trainees to evaluate whether they understand and are using effective tactics to learn the material.
Elaborate on the subject.	Present the material in different contexts and settings. Relate new ideas to previously learned concepts. Practice in a variety of contexts and settings.
Provide memory cues.	Suggest memory aids. Use familiar sounds or rhymes as memory cues.
Transfer course content to the workplace.	Design the learning environment so that it has elements in common with the workplace. Require learners to develop action plans that apply training content to their jobs. Use words that link the course to the workplace.
Provide feedback about performance.	Tell trainees how accurately and quickly they are performing their new skill. Show how trainees have met the objectives of the training.

Table 7.5

Ways That Training Helps Employees Learn

SOURCES: Adapted from R. M. Gagne, "Learning Processes and Instruction," *Training Research Journal* 1 (1995/96), pp. 17–28; and Traci Sitzmann, "Self-Regulating Online Course Engagement," *T&D*, March 2010, Business & Company Resource Center, <http://galenet.galegroup.com>.

the training. Feedback should include praise when trainees show they have learned material, as well as guidance on how to improve.

Well-designed training helps people remember the content. Training programs need to break information into chunks that people can remember. Research suggests that people can attend to no more than four to five items at a time. If a concept or procedure involves more than five items, the training program should deliver information in shorter sessions or chunks.<sup>38</sup> Other ways to make information more memorable include presenting it with visual images and practicing some tasks enough that they become automatic.

Written materials should have an appropriate reading level. A simple way to assess **readability**—the difficulty level of written materials—is to look at the words being used and at the length of sentences. In general, it is easiest to read short sentences and simple, standard words. If training materials are too difficult to understand, several adjustments can help. The basic approach is to rewrite the material looking for ways to simplify it.

- Substitute simple, concrete words for unfamiliar or abstract words.
- Divide long sentences into two or more short sentences.
- Divide long paragraphs into two or more short paragraphs.
- Add checklists (like this one) and illustrations to clarify the text.

### Readability

The difficulty level of written materials.

**Figure 7.3**

Measures of Training Success



**L07** Evaluate the success of a training program.

**Transfer of Training**  
On-the-job use of knowledge, skills, and behaviors learned in training.

Another approach is to substitute video, hands-on learning, or other nonwritten methods for some of the written material. A longer-term solution is to use tests to identify employees who need training to improve their reading levels and to provide that training first.

## Measuring Results of Training

After a training program ends, or at intervals during an ongoing training program, organizations should ensure that the training is meeting objectives. The stage to prepare for evaluating a training program is when the program is being developed. Along with designing course objectives and content, the planner should identify how to measure achievement of objectives. Depending on the objectives, the evaluation can use one or more of the measures shown in Figure 7.3: trainee satisfaction with the program, knowledge or abilities gained, use of new skills and behavior on the job (transfer of training), and improvements in individual and organizational performance. The usual way to measure

whether participants have acquired information is to administer tests on paper or electronically. Trainers or supervisors can observe whether participants demonstrate the desired skills and behaviors. Surveys measure changes in attitude. Changes in company performance have a variety of measures, many of which organizations keep track of for preparing performance appraisals, annual reports, and other routine documents in order to demonstrate the final measure of success shown in Figure 7.3: return on investment.

## Evaluation Methods

Evaluation of training should look for **transfer of training**, or on-the-job use of knowledge, skills, and behaviors learned in training. Transfer of training requires that employees actually learn the content of the training program and that the necessary conditions are in place for employees to apply what they learned. Thus, the assessment can look at whether employees have an opportunity to perform the skills related to the training. The organization can measure this by asking employees three questions about specific training-related tasks:

1. Do you perform the task?
2. How many times do you perform the task?
3. To what extent do you perform difficult and challenging learned tasks?

Frequent performance of difficult training-related tasks would signal great opportunity to perform. If there is low opportunity to perform, the organization should conduct further needs assessment and reevaluate readiness to learn. Perhaps the organization does not fully support the training activities in general or the employee's supervisor does not provide opportunities to apply new skills. Lack of transfer can also mean that employees have not learned the course material. The organization might offer a refresher course to give trainees more practice. Another reason for poor transfer of training is that the content of the training may not be important for the employee's job.

Assessment of training also should evaluate training *outcomes*, that is, what (if anything) has changed as a result of the training. The relevant training outcomes are the ones related to the organization's goals for the training and its overall performance. Possible outcomes include the following:

- Information such as facts, techniques, and procedures that trainees can recall after the training.
- Skills that trainees can demonstrate in tests or on the job.
- Trainee and supervisor satisfaction with the training program.
- Changes in attitude related to the content of the training (for example, concern for safety or tolerance of diversity).
- Improvements in individual, group, or company performance (for example, greater customer satisfaction, more sales, fewer defects).

Training is a significant part of many organizations' budgets. Therefore, economic measures are an important way to evaluate the success of a training program. Businesses that invest in training want to achieve a high *return on investment*—the monetary benefits of the investment compared to the amount invested, expressed as a percentage. For example, IBM's e-learning program for new managers, Basic Blue, costs \$8,708 per manager.<sup>39</sup> The company has measured an improvement in each new manager's performance worth \$415,000. That gives IBM a benefit of  $\$415,000 - \$8,708 = \$406,292$  for each manager. This is an extremely large return on investment:  $\$406,292/\$8,708 = 46.65$ , or 4,665 percent! In other words, for every \$1 IBM invests in Basic Blue, it receives almost \$47.

For any of these methods, the most accurate but most costly way to evaluate the training program is to measure performance, knowledge, or attitudes among all employees before the training and then train only part of the employees. After the training is complete, the performance, knowledge, or attitudes are again measured, and the trained group is compared with the untrained group. A simpler but less accurate way to assess the training is to conduct the pretest and posttest on all trainees, comparing their performance, knowledge, or attitudes before and after the training. This form of measurement does not rule out the possibility that change resulted from something other than training (for example, a change in the compensation system). The simplest approach is to use only a posttest. Use of only a posttest can show if trainees have reached a specified level of competency, knowledge, or skill. Of course, this type of measurement does not enable accurate comparisons, but it may be sufficient, depending on the cost and purpose of the training.

## Applying the Evaluation

The purpose of evaluating training is to help with future decisions about the organization's training programs. Using the evaluation, the organization may identify a need to modify the training and gain information about the kinds of changes needed. The organization may decide to expand on successful areas of training and cut back on training that has not delivered significant benefits.

At the Mayo Clinic, evaluation of training for new managers helped the organization select the most cost-effective method. Mayo had determined that new managers needed training in management skills. Coaching would be more expensive than classes, but would it be more effective? The organization tried both forms of training with two test groups of managers. Then it assessed trainees' satisfaction with the program and the managers' knowledge and performance after the program. There was no statistically significant difference in these measures between the two groups, so Mayo decided to proceed with the less costly method, classroom training.<sup>40</sup>

**L08** Describe training methods for employee orientation and diversity management.

### Orientation

Training designed to prepare employees to perform their jobs effectively, learn about their organization, and establish work relationships.

## Applications of Training

Two training applications that have become widespread among U.S. companies are orientation of new employees and training in how to manage workforce diversity.

### Orientation of New Employees

Many employees receive their first training during their first days on the job. This training is the organization's **orientation** program—its training designed to prepare employees to perform their job effectively, learn about the organization, and establish work relationships. Organizations provide for orientation because, no matter how realistic the information provided during employment interviews and site visits, people feel shock and surprise when they start a new job.<sup>41</sup> Also, employees need to become familiar with job tasks and learn the details of the organization's practices, policies, and procedures.

The objectives of orientation programs include making new employees familiar with the organization's rules, policies, and procedures. Table 7.6 summarizes the content of a typical orientation program. Such a program provides information about the overall company and about the department in which the new employee will be working. The topics include social as well as technical aspects of the job. Miscellaneous information helps employees from out of town learn about the surrounding community.

At Randstad North America, a staffing services company, orientation for new staffing agents takes place over 16 weeks. To get basic facts about their job, new employees use online resources, while classroom instruction focuses on understanding the Randstad culture. District managers give presentations on the company's culture, job

**Table 7.6**

#### Content of a Typical Orientation Program

<b>Company-level information</b>
Company overview (e.g., values, history, mission)
Key policies and procedures
Compensation
Employee benefits and services
Safety and accident prevention
Employee and union relations
Physical facilities
Economic factors
Customer relations
<b>Department-level information</b>
Department functions and philosophy
Job duties and responsibilities
Policies, procedures, rules, and regulations
Performance expectations
Tour of department
Introduction to department employees
<b>Miscellaneous</b>
Community
Housing
Family adjustment

SOURCE: J. L. Schwarz and M. A. Weslowski, "Employee Orientation: What Employers Should Know," *Journal of Contemporary Business Issues*, Fall 1995, p. 48. Used with permission.

expectations, selling, performance, and bonus plans. Trainees shadow more experienced co-workers, and managers provide coaching. The company credits this orientation program with enabling agents to increase sales by \$4 million.<sup>42</sup>

Orientation programs may combine various training methods such as printed and audiovisual materials, classroom instruction, on-the-job training, and e-learning. Decisions about how to conduct the orientation depend on the type of material to be covered and the number of new employees, among other factors.

## Diversity Training

In response to Equal Employment Opportunity laws and market forces, many organizations today are concerned about managing diversity—creating an environment that allows all employees to contribute to organizational goals and experience personal growth. This kind of environment includes access to jobs as well as fair and positive treatment of all employees. Chapter 3 described how organizations manage diversity by complying with the law. Besides these efforts, many organizations provide training designed to teach employees attitudes and behaviors that support the management of diversity, such as appreciation of cultural differences and avoidance of behaviors that isolate or intimidate others.

Training designed to change employee attitudes about diversity and/or develop skills needed to work with a diverse workforce is called **diversity training**. These programs generally emphasize either attitude awareness and change or behavior change.

Programs that focus on attitudes have objectives to increase participants' awareness of cultural and ethnic differences, as well as differences in personal characteristics and physical characteristics (such as disabilities). These programs are based on the assumption that people who become aware of differences and their stereotypes about those differences will be able to avoid letting stereotypes influence their interactions with people. Many of these programs use video and experiential exercises to increase employees' awareness of the negative emotional and performance effects of stereotypes and resulting behaviors on members of minority groups. A risk of these programs—especially when they define diversity mainly in terms of race, ethnicity, and sex—is that they may alienate white male employees, who conclude that if the company values diversity more, it values them less.<sup>43</sup> Diversity training is more likely to get everyone onboard if it emphasizes respecting and valuing all the organization's employees in order to bring out the best work from everyone to open up the best opportunities for everyone.

Programs that focus on behavior aim at changing the organizational policies and individual behaviors that inhibit employees' personal growth and productivity. Sometimes these programs identify incidents that discourage employees from working up to their potential. Employees work in

### Diversity Training

Training designed to change employee attitudes about diversity and/or develop skills needed to work with a diverse workforce.



Diversity training programs, like the one conducted by Harvard Pilgrim Health Care, are designed to teach employees attitudes and behaviors that support the management of diversity. Why is it important for companies to provide this type of training?

groups to discuss specific promotion opportunities or management practices that they believe were handled unfairly. Another approach starts with the assumption that all individuals differ in various ways and teaches skills for constructively handling the communication barriers, conflicts, and misunderstandings that necessarily arise when different people try to work together.<sup>44</sup> Trainees may be more positive about receiving this type of training than other kinds of diversity training. Finally, some organizations provide diversity training in the form of *cultural immersion*, sending employees directly into communities where they have to interact with persons from different cultures, races, and nationalities. Participants might talk with community members, work in community organizations, or learn about events that are significant to the community they visit. Pepsi addresses behavior change at the highest level of the organization. Senior executives are assigned to be sponsors for specific employee groups, including African Americans, Latinos, Asians, women, white males, women of color, disabled employees, and employees who are gay, lesbian, or transgendered. The executives are responsible for understanding the needs of their assigned group, for identifying talent, and for mentoring at least three of these employees.<sup>45</sup>

Although many organizations have used diversity training, few have provided programs lasting more than a day, and few have researched their long-term effectiveness.<sup>46</sup> The little research that exists on the subject has provided no support for a direct link between diversity programs and business success, but there is evidence that some characteristics make diversity training more effective.<sup>47</sup> Most important, the training should be tied to business objectives, such as understanding customers. The support and involvement of top management, and the involvement of managers at all levels, also are important. Diversity training should emphasize learning behaviors and skills, not blaming employees. Finally, the program should help employees see how they can apply their new skills on the job, deliver rewards for performance, be tied to organizational policies and practices that value diversity, and include a way to measure the success of the training.

An example of a company that gets it right is Sodexo USA, a food and facilities management company, which provides diversity training at all levels. Senior executives participate in classroom training reinforced with community involvement and mentoring relationships. They learn how valuing diversity helps the company meet business challenges, and they are assessed for meeting targets to hire and promote a diverse group of employees, as well as for participation in training, mentoring, and community outreach. Managers can participate in learning labs that address topics such as cross-cultural communications and generational differences in the workplace. Employees have opportunities to learn diversity-related skills relevant to their jobs, such as how to sell to diverse clients or how to recruit diverse employees. Significantly, Sodexo also makes an effort to measure the results of these programs. It has found, for example, that its mentoring program has made a measurable difference in the productivity and retention of female employees and employees of color.<sup>48</sup>



## thinking ethically

### TRAINING EMPLOYEES TO RESPECT PRIVACY

Many employees deal with information that requires a respect for someone's privacy. Examples include employees who process data related to patients' or employees' health, clients' financial matters, and corporate secrets, such as a new product under development. Employees also need to identify appropriate boundaries with one another: for instance, when, if ever, is it OK for one employee to read another's e-mail messages without permission? The answers to such questions must meet ethical (and sometimes legal) requirements. For example, some companies have fired employees for sending e-mail that is "inappropriate" but haven't clarified for their employees how to measure appropriateness—or even that the company monitors e-mail.

To help employees identify situations requiring protection of others' privacy and to teach them how to handle those situations appropriately, some companies provide training in privacy matters. For instance, hospitals may train employees to notice, report, and prevent situations where carelessness with computers or paper makes it possible that the privacy of patients' data was compromised. Employees responsible for a company's information system need policies and guidance for identifying and communicating the boundaries between employees' privacy rights and the organization's right to know what its employees' are doing and communicating.

At Claremont Savings Bank, training in privacy begins at employee orientation. That training program includes case studies of actual situations involving customers' privacy. To reinforce those lessons, the human resource department for the New Hampshire bank

uses real-world privacy examples in ongoing communications with the bank's employees. In addition, every year, Claremont's board of directors reviews and approves the bank's privacy policy, and then the HR department communicates with employees to describe any changes or areas needing reinforcement.

SOURCES: Eric Krell, "Privacy Matters," *HR Magazine*, February 2010, Business & Company Resource Center, <http://galenet.galegroup.com>; Jay Cline, "Privacy Training Gone Awry," *Computerworld*, February 8, 2010, Business & Company Resource Center, <http://galenet.galegroup.com>; and "Security: Employees Are Key," *Health Management Technology*, January 2010, Business & Company Resource Center, <http://galenet.galegroup.com>.

### Questions

1. In general, what skills and abilities do employees need for making ethical decisions about privacy? What else do they need besides skills and abilities?
2. Suppose you became responsible for providing training in privacy at Claremont Savings Bank. Describe the training methods you think would be most effective, and explain why you chose those methods.
3. Suppose you work in a company's human resource department, and a rumor has reached you that one of the employees during her lunch hour sent out an e-mail to a few friends, describing an embarrassing but not illegal situation she had been in over the weekend. Someone from the company's IT department came to you with the news. What should be your response to this situation? Where in the company are ethical (or legal) issues that should be addressed? How will you address them?

## SUMMARY

**LO1** Discuss how to link training programs to organizational needs.

Organizations need to establish training programs that are effective. In other words, they teach what they are designed to teach, and they teach skills and behaviors that will help the organization achieve its goals. Organizations create such programs through instructional design. This process begins with a needs assessment. The organization then ensures readiness for training, including employee characteristics and organizational support. Next, the organization plans a training program, implements the program, and evaluates the results.

**LO2** Explain how to assess the need for training.

Needs assessment consists of an organization analysis, person analysis, and task analysis. The organization analysis determines the appropriateness of training by evaluating the characteristics of the organization, including its strategy, resources, and management support. The person analysis determines individuals' needs and readiness for training. The task analysis identifies the tasks, knowledge, skills, and behaviors that training should emphasize. It is based on examination of the conditions in which tasks are performed, including equipment and environment of the job, time constraints, safety considerations, and performance standards.

**LO3** Explain how to assess employees' readiness for training.

Readiness for training is a combination of employee characteristics and positive work environment that permit training. The necessary employee characteristics include ability to learn the subject matter, favorable attitudes toward the training, and motivation to learn. A positive work environment avoids situational constraints such as lack of money and time. In a positive environment, both peers and management support training.

**LO4** Describe how to plan an effective training program.

Planning begins with establishing objectives for the training program. These should define an expected performance or outcome, the desired level of performance, and the conditions under which the performance should occur. Based on the objectives, the planner decides who will provide the training, what topics the training will cover, what training methods to use, and how to evaluate the training. Even when organizations purchase outside training, someone in the organization, usually a member of the HR department, often is responsible for training administration. The training methods selected should be related to the objectives and content of the training program. Training methods may include presentation methods, hands-on methods, or group-building methods.

**LO5** Compare widely used training methods.

Classroom instruction is most widely used and is one of the least expensive and least time-consuming ways to present information on a specific topic to many trainees. It also allows for group interaction and may include hands-on practice. Audiovisual and computer-based training need not require that trainees attend a class, so organizations can reduce time and money spent on training. Computer-based training may be interactive and may provide for group interaction. On-the-job training methods such as apprenticeships and internships give trainees firsthand experiences. A simulation represents a real-life situation, enabling trainees to see the effects of their decisions without dangerous or expensive consequences. Business games and case studies are other methods for practicing decision-making skills. Participants need to come together in one location or collaborate online. Behavior modeling gives trainees a chance to observe desired behaviors, so this technique can be effective for teaching interpersonal skills. Experiential and adventure learning programs provide an opportunity for group members to interact in challenging circumstances but may exclude members with disabilities. Team training focuses a team on achievement of a common goal.

Action learning offers relevance, because the training focuses on an actual work-related problem.

**LO6** Summarize how to implement a successful training program.

Implementation should apply principles of learning. In general, effective training communicates learning objectives, presents information in distinctive and memorable ways, and helps trainees link the subject matter to their jobs. Employees are most likely to learn when training is linked to job experiences and tasks. Employees learn best when they demonstrate or practice what they have learned and when they receive feedback that helps them improve. Trainees remember information better when it is broken into small chunks, presented with visual images, and practiced many times. Written materials should be easily readable by trainees.

**LO7** Evaluate the success of a training program.

Evaluation of training should look for transfer of training by measuring whether employees are performing the tasks taught in the training program. Assessment of training also should evaluate training outcomes, such as change in attitude, ability to perform a new skill, and recall of facts or behaviors taught in the training program. Training should result in improvement in the group's or organization's outcomes, such as customer satisfaction or sales. An economic measure of training success is return on investment.

**LO8** Describe training methods for employee orientation and diversity management.

Employee orientation is training designed to prepare employees to perform their job effectively, learn about the organization, and establish work relationships. Organizations provide for orientation because, no matter how realistic the information provided during employment interviews and site visits, people feel shock and surprise when they start a new job, and they need to learn the details of how to perform the job. A typical orientation program includes information about the overall company and the department in which the new employee will be working, covering social as well as technical aspects of the job. Orientation programs may combine several training methods, from printed materials to on-the-job training to e-learning. Diversity training is designed to change employee attitudes about diversity and/or develop skills needed to work with a diverse workforce. Evidence regarding these programs suggests that diversity training is most effective if it is tied to business objectives, has management support, emphasizes behaviors and skills, and is tied to organizational policies and practices that value diversity, including a way to measure success.

## KEY TERMS

- action learning, p. 207
- adventure learning, p. 205
- apprenticeship, p. 202
- avatars, p. 204
- coordination training, p. 206
- cross-training, p. 206
- diversity training, p. 213
- e-learning, p. 201
- experiential programs, p. 205
- instructional design, p. 189
- internship, p. 203
- learning management system (LMS), p. 189
- needs assessment, p. 190
- on-the-job training (OJT), p. 202
- organization analysis, p. 191
- orientation, p. 212
- person analysis, p. 193
- readability, p. 209
- readiness for training, p. 194
- simulation, p. 203
- task analysis, p. 193
- team leader training, p. 207
- training, p. 189
- transfer of training, p. 210
- virtual reality, p. 204

## REVIEW AND DISCUSSION QUESTIONS

1. “Melinda!” bellowed Toran to the company’s HR specialist, “I’ve got a problem, and you’ve got to solve it. I can’t get people in this plant to work together as a team. As if I don’t have enough trouble with our competitors and our past-due accounts, now I have to put up with running a zoo. You’re responsible for seeing that the staff gets along. I want a training proposal on my desk by Monday.” Assume you are Melinda.
  - a. Is training the solution to this problem? How can you determine the need for training?
  - b. Summarize how you would conduct a needs assessment.
2. How should an organization assess readiness for learning? In Question 1, how do Toran’s comments suggest readiness (or lack of readiness) for learning?
3. Assume you are the human resource manager of a small seafood company. The general manager has told you that customers have begun complaining about the quality of your company’s fresh fish. Currently, training consists of senior fish cleaners showing new employees how to perform the job. Assuming your needs assessment indicates a need for training, how would you plan a training program? What steps should you take in planning the program?
4. Many organizations turn to e-learning as a less-expensive alternative to classroom training. What are some other advantages of substituting e-learning for classroom training? What are some disadvantages?
5. Suppose the managers in your organization tend to avoid delegating projects to the people in their groups. As a result, they rarely meet their goals. A training needs analysis indicates that an appropriate solution is training in management skills. You have identified two outside training programs that are consistent with your goals. One program involves experiential programs, and the other is an interactive computer program. What are the strengths and weaknesses of each technique? Which would you choose? Why?
6. Consider your current job or a job you recently held. What types of training did you receive for the job? What types of training would you like to receive? Why?
7. A manufacturing company employs several maintenance employees. When a problem occurs with the equipment, a maintenance employee receives a description of the symptoms and is supposed to locate and fix the source of the problem. The company recently installed a new, complex electronics system. To prepare its maintenance workers, the company provided classroom training. The trainer displayed electrical drawings of system components and posed problems about the system. The trainer would point to a component in a drawing and ask, “What would happen if this component were faulty?” Trainees would study the diagrams, describe the likely symptoms, and discuss how to repair the problem. If you were responsible for this company’s training, how would you evaluate the success of this training program?
8. In Question 7, suppose the maintenance supervisor has complained that trainees are having difficulty trouble-shooting problems with the new electronics system. They are spending a great deal of time on problems with the system and coming to the supervisor with frequent questions that show a lack of understanding. The supervisor is convinced that the employees are motivated to learn the system, and they are well qualified. What do you think might be the problems with the current training program?

- What recommendations can you make for improving the program?
- Who should be involved in orientation of new employees? Why would it not be appropriate to provide employee orientation purely online?
  - Why do organizations provide diversity training? What kinds of goals are most suitable for such training?

## BUSINESSWEEK CASE

### BusinessWeek The World Is IBM's

#### Classroom

When 10 IBM management trainees piled into a minibus in the Philippines for a weekend tour last October, the last thing they expected was to wind up local heroes. Yet that's what happened in the tiny village of Carmen. After passing a water well project, they learned the effort had stalled because of engineering mistakes and a lack of money. The IBMers decided to do something about it. They organized a meeting of the key people involved in the project and volunteered to pay \$250 out of their own pockets for additional building materials. Two weeks later the well was completed. Locals would no longer have to walk four miles for drinkable water. And the trainees learned a lesson in collaborative problem-solving. "You motivate people to take the extra step, you create a shared vision, you divide the labor, and the impact can be big," says Erwin van Overbeek, 40, who runs environmental sustainability projects for IBM clients.

While saving a village well wasn't part of the group agenda for that trip, it's the kind of experience the architects of IBM's Corporate Service Corps had in mind when they launched the initiative last year. Modeled on the U.S. Peace Corps, the program aims to turn IBM employees into global citizens. Last year, IBM selected 300 top management prospects out of 5,400 applicants. It then trained and dispatched them to emerging markets for a month in groups of 8 to 10 to help solve economic and social problems. The goal, says IBM's human resources chief, J. Randall MacDonald, is to help future leaders "understand how the world works, show them how to network, and show them how to work collaboratively with people who are far away."

Like most corporations, IBM trains managers in classrooms, so this represents a dramatic departure. And while other companies encourage employees to volunteer for social service, IBM is the first to use such programs for management training, says Rosabeth Moss Kanter, a professor at Harvard Business School.

The program is growing rapidly. This year some 500 people will participate, and the list of countries will expand from five to nine, including Brazil, India, Malaysia, and South Africa. The teams spend three months

before going overseas reading about their host countries, studying the problems they're assigned to work on, and getting to know their teammates via teleconferences and social networking Web sites. On location, they work with local governments, universities, and business groups to do anything from upgrading technology for a government agency to improving public water quality.

Participating in the program is not without its risks. Charlie Ung, a new-media producer from IBM Canada, got malaria while working in Ghana and spent a week in the hospital. Other participants report encounters with wild dogs in Romania. IBM planners deliberately choose out-of-the-way places and bunk the teams in guest houses that lack such amenities as Western food and CNN. "We want them to have a transformative experience, so they're shaken up and walk away feeling they're better equipped to confront the challenges of the 21st century," says Kevin Thompson, the IBMer who conceived of the CSC program and now manages it.

IBM concedes that one month overseas is a short stint, but it believes participants can pick up valuable lessons. Debbie Maconnel, a 45-year-old IT project manager in Lexington, Kentucky, says the trip prompted her to change her management style. She coordinates the activities of 13 people in the United States and 12 in India, Mexico, and China. She used to give assignments to the overseas employees and then leave them on their own. Now she spends more time trying to build a global team.

SOURCE: Excerpted from Steve Hamm, "The World Is IBM's Classroom," *BusinessWeek*, March 12, 2009, <http://www.businessweek.com>.

#### Questions

- Based on the information given but in your own words, what are the training objectives for IBM's Corporate Service Corps? Based on the information given, how well would you say the program is meeting those objectives? What additional measures would help you evaluate the program's success?
- Which of the training methods described in this chapter are incorporated into the Corporate Service Corps? How well suited are these methods to achieving IBM's objectives?
- Suggest some ways that IBM can help participants apply on the job what they have learned from their one-month service project.

## Case: Jack B. Kelley Drives Home Safety Lessons

Jack B. Kelley, Inc. (JBK) is a trucking company—a common carrier that hauls bulk commodities in tanker trucks for its customers around the United States and parts of Canada. It specializes in transporting compressed gas, liquid carbon dioxide, and a variety of specialized chemicals. It can deliver them on demand or will set up a regular distribution system for repeat loads.

The company defines a three-part corporate vision of being “(1) A great place for our customers”; “(2) A great place for people to work”; and having “(3) The financial strength to accomplish 1 and 2.” Especially at a company where most employees drive trucks delivering liquid and gas chemicals, it’s clear that safety is important not only for being “a great place” to work but also as a basis for providing the best service to customers and maintaining financial strength. “When drivers operate safely, they take better care of their equipment,” notes Mark Davis, JBK’s president. And, in fact, safety records are one of the company’s basic performance measures.

In support of these corporate objectives, safety training has an important place at JBK. It is the responsibility of Lee Drury, safety director at JBK, who started out with JBK as a trainer and has since put together a team of employees focused on safety.

Safety training begins as soon as the company hires new drivers. Groups of about four or five new employees meet in JBK’s corporate training facility for six days of classroom training and hands-on practice.

The first session introduces a variety of topics including the company’s drug-use policy, the types of commodities transported, the satellite tracking and communication system installed in the trucks, and the company’s history and culture. On the afternoon of the first session, drivers climb into a 15-passenger van to practice using the company’s satellite tracking system, which records and reports safety issues such as incidents of speeding or heavy braking, as well as other measures such as the amount of time the truck has been driving and idling. The trainers emphasize that the electronic reporting relieves them of paperwork and helps them become safer drivers, free to concentrate on the road.

The second day of training begins with lessons on managing driver fatigue. Then much of the remainder of the day is devoted to hands-on training in loading and unloading cryogenic liquids and compressed gases. This practice

is repeated on each of the remaining days of training. The goal is that by the end of the orientation training, employees will know how to load and unload each product JBK transports for its customers.

The third day of orientation training includes a visit to corporate headquarters, where the new drivers meet employees in the billing department who will handle their paperwork. They also meet Davis, who stresses JBK’s commitment to safety. Davis emphasizes that JBK’s goals include “zero accidents, zero incidents, and zero personal injuries.” During the remaining orientation days, the lessons on handling products are extended and reinforced with further practice. Drivers also learn how to refresh their memory on details by checking the company’s online information system.

After the orientation period, JBK’s drivers move to their home terminals, where each one is assigned to a driver trainer. There, training continues until the terminal manager and safety director determine that the new driver is fully prepared to work alone safely and professionally. Even then, a regional trainer rides along with the driver on at least one round trip to verify that the driver is handling the job well.

After orientation is behind them, drivers are fully prepared, but training continues to be available. The company provides refresher training to its experienced drivers, as well as the computer system where they can look up information on products they may not handle often.

SOURCES: Charles E. Wilson, “Award-Winning Safety Starts at the Top at Jack B. Kelley Inc.,” *Bulk Transporter*, June 1, 2009, Business & Company Resource Center, <http://galenet.galegroup.com>; Charles E. Wilson, “Safety Should Be a Zero-Sum Program,” *Bulk Transporter*, June 1, 2009, Business & Company Resource Center, <http://galenet.galegroup.com>; and Jack B. Kelley, Inc., “About Us,” corporate Web site, [www.jackbkelly.com](http://www.jackbkelly.com), accessed March 29, 2010.

### Questions

1. How is training at Jack B. Kelley related to its organizational needs?
2. If you were involved in preparing JBK’s safety training program, how would you assess employees’ readiness for training? In what ways can (or does) the company’s work environment support the training?
3. Do you think e-learning might be an appropriate training method for JBK’s drivers? Why or why not?



## IT'S A WRAP!



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**Review**

- Chapter learning objectives
- Test Your Knowledge: Training Methods

**Application**

- Manager's Hot Seat segment: "Working in Teams: Cross-Functional Dysfunction"
- Video case and quiz: "Johnson & Johnson eUniversity"
- Self-Assessment: Evaluate Your Own Training Needs
- Web exercise: Online Learning Courses
- Small-business case: How Nick's Pizza Delivers Training Results

**Practice**

- Chapter quiz

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