

The HCIMA code of conduct

HCIMA is an internationally recognised management organisation for managers and potential managers in the hospitality, leisure and tourism industries. It is a registered charity and has a worldwide membership which covers all sectors of the industry including hotels, restaurants, cost sector catering, pubs and clubs, as well as leisure outlets, theme parks and sports venues. Membership of the Association confers a respected acknowledgement of an individual's qualifications and specific industry experience through designatory letters; and enables members to progress professionally, network with industry contacts and enjoy a wide range of services and benefits.

The obligations of members

The Memorandum of the Association states that the main objectives of the HCIMA are:

- (i) The promotion of standards and management good practice
- (ii) The advancement of education and training, in particular promoting research and the dissemination of the outcomes.

Members of the Association are committed to the achievement of these objectives and to the maintenance of the standards of professional conduct as established by the Code of Conduct. This defines the standards required by the Articles of the Association and is in two parts:

- 1 Rules of Conduct – These define the professional standards which members must maintain as a condition of membership. Adherence to these rules is obligatory. Failure to do so may lead to disciplinary action being taken against the member in accordance with the Bye-Laws.
- 2 Principles of Good Professional Practice – These principles expand upon the basic standards set down in the Rules of Conduct and indicate the standards which members should seek to achieve in the interests of good practice. Failure to achieve these standards alone would not lead to disciplinary action, but in the event of any complaint being considered under the disciplinary procedure, such failure would be admissible in evidence and taken into account in proceedings before the Disciplinary Committee.

The rules of conduct

In general, members of the Association are required to exercise their professional skill and judgement to the best of their ability and to carry out faithfully their professional responsibilities with integrity. In particular, members shall:

- 1 Comply with the laws and ethical customs and practices of any country in which they work.
- 2 Uphold and safeguard the reputation and standards of HCIMA.
- 3 Use their HCIMA designatory letters where possible:
 - for purposes, and in a style, which conform with the objectives and uphold the dignity of the Association and
 - in conjunction with their own name.
- 4 Declare to HCIMA any conflict of interest which might arise in the course of representing the Association.
- 5 Not misuse their authority for personal aggrandisement or gain.
- 6 Respect the confidentiality of information.
- 7 Maintain a proper balance between the interest of employer or proprietor and customers, clients and suppliers.

The principles of good professional practice

Members of HCIMA must accept the responsibilities and obligations implicit in their work. In respect of themselves and others with whom they interact in the course of their professional life, they should seek to maintain and promote the following standards:

- (a) In respect of HCIMA and fellow members:
 - avoid injuring or damaging, directly or indirectly, the reputation, interests or prospects of fellow members
 - promote and recommend the Association and its standards
 - uphold the educational standards and policies of the Association and support the advancement and acquisition of education, training and qualifications
 - avoid bringing the Association into disrepute
 - when acting as a representative of HCIMA, the interests of the Association should be paramount to personal or employers' interests
 - not knowingly misrepresent the corporate views of the Association in public
 - avoid professional criticism, by maintaining a high standard of performance.
- (b) Personally:
 - regulate their professional affairs to a high standard of integrity and uphold their statutory responsibilities in all respects
 - make proper use of resources available
 - when in pursuit of personal ambitions and interests take account of the interest of others
 - maintain their standards of professional competence, knowledge and skill; and
 - take advantage of opportunities for training and education offered to advance and improve personal professional standards.

- (c) In respect of their employers:
 - carry out duties and responsibilities conscientiously and with proper regard for the employer's interests
 - apply the lawful policies of the employer obviating corrupt practice, particularly in relation to receiving gifts or benefits
 - disclose immediately and fully to an employer any interest which conflicts with those of the employer
 - consult with and advise the employer on the implementation or adoption of new developments in the profession or industry
 - have full regard for the interest of the profession and the public interest in fulfilling obligations to the employer.
- (d) In respect of colleagues and subordinates:
 - help and encourage their professional development through the acquisition of skills, qualifications and training
 - promote good relationships through effective communication and consultation
 - establish their confidence in and respect for himself (the member) and his qualification
 - protect at all times their health, safety and welfare.
- (e) In respect of customers, clients and suppliers:
 - promote the standing, impartiality and good name of the HCIMA
 - establish good, but detached, relationships
 - avoid endorsing any product through advertising in a way that impairs HCIMA's impartiality
 - establish and develop with customers, clients and suppliers a relationship leading to mutual confidence
 - protect at all times the health and safety of customers.

Note: Information adapted from the HCIMA Code of Conduct April 2005.

HCIMA management guide

Hospitality Assured

What is it?

Hospitality Assured is *The Standard for Service and Business Excellence* in hospitality, championed by the Hotel and Catering International Management Association (HCIMA) and supported by the British Hospitality Association (BHA).

The standard is fully endorsed by the British Quality Foundation and the Quality Scotland Foundation as meeting the criteria in the EFQM Excellence Model, which is owned by the European Foundation for Quality Management (EFQM). It is the only standard within the Hospitality Industry that focuses on the customer experience.

The process for achieving Hospitality Assured recognition is rigorous. It takes into account customer opinion and considers all the aspects of service from the customers' point of view. This is an accreditation which is not achieved easily. It is an ongoing process that provides a series of performance indicators against which an organisation can continually judge and measure itself.

Hospitality Assured gives customers the opportunity to choose an organisation where high quality service is guaranteed. The hallmark of Hospitality Assured accredited organisations is a powerful desire to exceed customer expectations, within a climate of continuous improvement and business excellence. Customers can therefore be confident that they will be satisfied by any organisation that is Hospitality Assured.

The Standard for Service and Business Excellence comprises 10 steps.



The ten steps comprise 49 key requirements or criteria. These are all measurable objectives. The standard, however, is not prescriptive. It does not lay down precisely how objectives will be met – they will vary organisation by organisation, according to that organisation’s customer promise. For example a customer promise in a conference centre will be different to a cruise ship, a pub or a care home.

Why become Hospitality Assured?

Hospitality Assured was created for the industry, by the industry and is based on best international practice. Hospitality Assured is owned and managed by the HCIMA.

Hospitality Assured ‘accredited’ organisations enjoy a number of significant advantages. These include:

- Being seen as one of the very best organisations in the hospitality industry by customers, employees, stakeholders and competitors.
- Being able to use powerful business tools and objective external assessment to stimulate and measure performance improvement in service delivery and business excellence.
- Being able to Benchmark the accredited organisation against the best in class.
- Using the Hospitality Assured mark to promote the accredited organisation to existing and new customers.
- Demonstrating that the accredited organisation is a quality employer.
- The most appropriate standard for the particular area of business.
- For Local Authorities, it helps significantly with preparation for ‘best value’ reviews, by demonstrating ‘best value’.

- It helps to protect existing business.
- It proves that a catering service is reputable.
- The methodology used in the Hospitality Assured process demonstrates the importance placed on customers.
- The standard's criteria stands up to the external scrutiny of stakeholders.
- Improved listening to customers.
- Faster reaction to customer needs.
- It encourages staff motivation and team-building at all levels.
- It can create a new mission statement and service promise.
- It finds the gaps in service delivery.
- It highlights good practice.
- It underpins ongoing improvement.
- It facilitates target-setting and performance monitoring.

Who can become Hospitality Assured?

Any organisation – small or large, single or multi-unit in hospitality, leisure and tourism, with a desire to improve its service to customers and improve its operational and business excellence – is eligible.



In the meetings and conference sector, Hospitality Assured has partnered The Meetings Industry Association (MIA). Members of the MIA can seek to achieve Hospitality Assured-Meetings (HA-M), which is promoted to meetings buyers as a mark of Service and Business Excellence in the meetings industry (for the updated list of accredited organisations, visit www.hospitalityassured.com).

Who has achieved Hospitality Assured?

There are currently over 130 corporate organisations (for the updated list of accredited organisations, visit www.hospitalityassured.com) – representing some 3500 trading outlets and involving more than 50,000 staff in the following sectors – which have been successful in achieving Hospitality Assured accreditation by meeting the minimum requirements of the standard.

Hospitality Assured sectors

- Bars, Pubs and Inns
- Clubs
- Colleges
- Conference Centres
- Foodservice and Facilities Management
- Healthcare
- Hotels
- Leisure
- Local Authority
- Meetings (MIA)
- Other
- Restaurants
- Transport
- Universities

Simple steps to achieving Hospitality Assured include:

- 1 Contacting Hospitality Assured.
- 2 Asking for a visit or attend an induction seminar.
- 3 Attending workshops – these are staged either at an organisation’s premises or publicly, providing managers and supervisors with a sound working knowledge of ‘The Standard for Service and Business Excellence’, evidential requirements, and how to use the Hospitality Assured ‘self-assessment’ business improvement tool.
- 4 Carrying out ‘Self-Assessment’ – a fast and dynamic process to check an organisation’s own strengths and weaknesses against the ten steps of the standard. This process should involve a cross-section of the operation’s managers, supervisors and front-line staff.
- 5 Getting ready for ‘Assessment’ – a period (typically 6–12 months) of building on strengths and addressing areas for improvement, highlighted by the self-assessment process. Help is now available from consultants during this period.
- 6 Booking an ‘External Assessment’ – when confident, an organisation can request Hospitality Assured to organise an external visit from the scheme’s assessment body, MQA. Assessment is mainly carried out by meeting and interviewing an organisation’s management team and staff, in order to gather evidence of processes in action. The assessment will be planned with you in advance by the assessment team from MQA.
- 7 Achieving ‘Accreditation’ – this will be awarded if an organisation is judged to have scored at least 60% against the ‘Standard for Service and Business Excellence’, with a minimum score of 50% in each and every one of the standard’s ten steps.
- 8 Planning for ‘Re-Assessment’ – to maintain accreditation, organisations must agree to be re-assessed annually and continue to meet the minimum requirement for accreditation. The focus in re-assessment is to measure positive change and continuous improvement.

Scheme Pack – Brilliant Business Improvement Tool

The Hospitality Assured Scheme Pack is the starter kit for Hospitality Assured. It contains the *standard*; *guidelines* as to the evidence required to meet the standard; and, importantly, a *self-assessment business improvement tool*. The cost is £100, or £75 to HCIMA members, available from hospitalityassured@hcima.co.uk or mia@meetings.org.

Quotes from Hospitality Assured accredited organisations

Hotels

One of the world’s most famous hotels – the 133-bedroom The Ritz, London – became the first five-star hotel in the capital to achieve Hospitality Assured when it was initially assessed in 2001. Former Managing Director Luc Delafosse said: “The Ritz London has greatly benefited from participation in Hospitality Assured – it has been the right catalyst for the hotel. You cannot deliver good service unless you have happy employees. For our guests, it is the staff who make the difference, and this is where Hospitality Assured has had a major role to play in our success. I wanted an officially recognised organisation that could assess the service we offer, and take time to listen to

the management and staff. Since the Hospitality Assured standard is industry specific, it fitted the bill perfectly. The process leading to accreditation has proved highly motivating for everyone concerned, and we have taken, and will continue to take, on board all the assessors' comments and recommendations."

Food and Service Management

Linda Halliday, Partner and HR Director in contract caterers Wilson Storey Halliday, says that the company was initially accredited with Hospitality Assured five years ago, and the key steps of the standard could be applied to all aspects of the business. "With an annual turnover of £55 million and 1,600 staff, our vision is to be the best independent food-service provider in the UK," she states. "The essential ingredients of our business are people, food and communication. People are the most important aspect in helping to cope with growth in the business, so recruiting the right staff is vitally important, as is a thorough induction to the business. It is crucial that employees feel they are part of the business – a factor that underpins the Hospitality Assured process. I am passionate about good customer care. I would recommend Hospitality Assured because it enables you to benchmark your performance; and discover your strengths and weaknesses, helping you to continuously develop the weaker areas of your business and further build upon the areas where you are doing well. You should not get too hung up over Hospitality Assured scores; instead concentrate on your people, be innovative and take risks!"

Healthcare

Anchor Trust is the largest not-for-profit provider of housing and support for older people in England. Bob Bird, Head of Lifestyle Services, Anchor Homes, says of Hospitality Assured: "Anchor Homes is delighted at being given Hospitality Assured accreditation. We were impressed at the professionalism and thoroughness of the assessing team who went into great detail to understand the ethos and culture of our organisation. The extremely constructive observations and recommendations made, will without doubt, enable us to further improve our service delivery to our customers in the next few months."

Leisure

West Ham United Hospitality Ltd scored a remarkable double by gaining both the HCIMA-led Hospitality Assured accreditation for its hospitality facilities and the MIA-led Hospitality Assured-Meetings (HA-M) accreditation for its conference and banqueting facilities. Director of West Ham United Hospitality, David Thorpe-Tracey MHCIMA, said: "We are delighted that all our efforts have been recognised with the HCIMA- and MIA-led Hospitality Assured awards. Our success will not go to our heads! My team and I have assured the Football Club that we will not be resting on our laurels and will be continuing to strive to achieve excellence."

Local Authorities

Irene Carroll, General Manager of City Catering at Southampton City Council, says she and her team are delighted at being awarded Hospitality Assured for school

catering, civic hospitality, meals-on-wheels and a sixth-form college. "We are now building on the lessons learnt from achieving Hospitality Assured to formulate a strategy to ensure that continuous improvements are made to the whole service. Due to the accreditation, we have become far more focused on detailed business planning, strategic development and benchmarking. Embarking and working our way through the Hospitality Assured process was the best 'wake up' call City Catering could have had. We had every reason to be proud of what we had achieved in a very short space of time for a new organisation, but now we can achieve even more while working within the guidelines of Hospitality Assured. I would recommend it to any organisation!"

Lord Thurso, MP FHCIMA

Quality and profits have
always been inextricably linked.
Hospitality Assured is the
Simplest and the most cost
Effective method I have come across
for improving quality. It is
clearly a benchmark for our industry's future.

For further Information

To find out more about Hospitality Assured, contact: Tony Lainchbury MHCIMA, Hospitality Assured General Manager; or Steven Bulloch, Hospitality Assured Administrator, at: HCIMA, Trinity Court, 34 West Street, Sutton, Surrey SM1 1SH – on telephone: 020 8661 4918; fax: 020 8661 4901; email: hospitalityassured@hcima.co.uk or stevenb@hcima.co.uk. The website is www.hospitalityassured.com.

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Risk Management

Introduction

Risk Management is the process which aims to help organisations understand, evaluate and take action on all their risks with a view to increasing the probability of their success and reducing the likelihood of failure. (Institute of Risk Management, 2003)

Risk Management is a strategic management activity involving a systematic approach to the management of risk. By formalising the practice of risk management it is possible to reduce operational costs to a business by diminishing the risks incurring accidents or loss.

Service industries' profitability depends on people using facilities and services. Any perception that a business premise or its practices are unsafe can be damaging to the reputation of the business. Prioritising the application of risk management to every aspect of a business ensures that risk or damage to either the business or individuals is greatly reduced or removed.

What is Risk Management?

Risk Management is a strategic and systematic approach which:

- Carefully examines the diverse activities of a business
- Is continuous and developmental
- Identifies potential risks
- Assesses those risks for potential frequency and severity
- Removes those risks which can be eliminated
- Reduces the effect of those that cannot be eliminated
- Increases probability of successful actions taken to investigate risk
- Supports financially the consequences of the risks that remain.

Key aims of Risk Management

Risk Management is a quality management system which ensures that business is conducted to the highest possible standard with the best quality of customer care.

The result of this will also be a reduction in costs associated with risk taking. Key aims should be:

- Improved written policies and strategies for risk management
- Safer business practices
- Safer business premises
- Increased staff awareness of risk taking and risk management
- Better education and training for staff on risk management
- Reduction of potential financial loss.

Where do risks occur?

Risks may occur in any element of a business organisation. All of these elements have a critical influence on the manager's ability to control risk. Risk Management is concerned with compiling information about the risk elements of the business which are usually easily identified by the organisation or are within its level of expertise.

The Risk Management review brings together the knowledge and the expertise to provide an estimate of the probability of an incident happening and then puts in place solutions to prevent or mitigate that occurrence.

The key elements to review within this process may be both internal and external. They include:

<i>Strategic</i>	Competition/Customers/Industry/Management
<i>Financial</i>	Accountancy Systems/Credit/Interest/Exchange Rates
<i>Operational</i>	Absence Management/Recruitment/Staff Turnover/Buildings and Associated Operations/Supplies and Suppliers
<i>Hazard</i>	Environment/Equipment/Health and Safety/IT Systems

Risk Assessment

In the hospitality, leisure and tourism industries a systematic and regular Risk Assessment procedure is vital. Undertaking a Risk Assessment is time consuming but business failure is the possible alternative. Producing standardised documentation is helpful in formalising the process and in ensuring that all risks are clearly identified. There are also legal and insurance implications for ensuring that a successful Risk Assessment is completed on a regular basis.

A large organisation may have a dedicated Risk Manager who would ensure that all aspects of the assessment are undertaken or delegated to appointed staff. In smaller organisations a manager with significant training and knowledge of the business, including its Health and Safety Policy, business procedures and overall methods of operation, should be responsible for its completion. The Risk Manager should also compile lists of appropriate external emergency services so that all staff have access to points of contact in case of incident or emergency.

The elements of an assessment should be small enough to be manageable but big enough to identify the start and completion of the process. For example, running a food service area may be a significant element of a business operation but in assessment terms it may be split into a number of parts, which should be assessed separately.

It is very important that interviewing and listening to staff, as well as observation and measurement, forms part of the assessment. This should

include preliminary discussions with those who work in the area to identify the scope of each assessment.

Legal requirement

The Management of Health and Safety at Work Regulations 1999 and their Approved Code of Practice require a Risk Assessment to be undertaken and, where more than five persons are employed, a record must be made of any 'significant' findings of the assessment and also of any specific group of employees identified by the assessment as particularly at risk.

Risk Identification

The Risk Assessor should approach Risk Identification in a systematic way. This should include all the elements identified previously: Strategic, Financial, Operational and Hazard.

Useful questions to ask are:

- What could go wrong?
- How could it happen?
- What would be the effect on the business and any individual?
- What should be done to remove, minimise and manage the risk?

Risk can arise from a single factor or a series of small factors, which can combine to cause loss or injury. Some risk is inherent in the operations of most businesses. The object of risk assessment and analysis is to determine how often the risk is likely to happen, what will be the financial effect on the organisation and how can the effect be minimised.

Legal requirement

Employers should be aware that an employee's act or default in violation of The Management of Health and Safety at Work Regulations 1999 may not reduce the employers' liability nor does it provide a defence in any criminal proceedings that may result.

Further Reading

Health & Safety Executive publications

Website: www.hsebooks.com/Books/
HSE Books, PO Box 1999, Sudbury, Suffolk CO10 2WA.
Tel: +44 (0)1787 881165
Fax: +44 (0)1787 313995

HSE publications website

Website: www.hse.gov.uk/pubns/index.htm
Information Line: +44 (0)8701 545500
Publications Line: +44 (0)1787 881165

Useful Risk Management publications

- A Guide to Risk Assessment Requirements – IND(G)218 – Free
- Risk Management – Frequently Asked Questions
- Five steps to Risk Assessment – IND(G)163 (rev1) – Free
- Five steps to Risk Assessment (Case Studies) ISBN 07 17615 804
- Good Practice and Pitfalls in Risk Assessment, Research Report 151, Health & Safety Laboratory, 2003
- Article 6(2)(a)-(i) of Council Directive 89/391/EEC (OJ No L 183, 29.6.89, p. 1)
- Fire Precautions (Workplace) Regulations 1997, Part II
- The Management of Health and Safety at Work Regulations 1999.

The Institute of Risk Management

Lloyd's Avenue House
6 Lloyd's Avenue
London EC3N 3AX
Tel: +44 (0)20 7709 9808
Website: www.theirm.org/index.html

Publications

A Risk Management Standard – **Free to download**

DISCLAIMER

This HCIMA Management Guide is intended as a brief summary to the topic. While the information it contains is believed to be correct, it is not a substitute for appropriate professional advice. The HCIMA can take no responsibility for action taken solely on the basis of this information.

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Effective staff training

An abridged version of the publication *How to Get the Best from Your Staff: An Introduction to Staff Training Skills* by Michael J. Boella.

Author's note

This book sets out to cover the basics of staff training. It covers in a simple, step-by-step process, each of the main areas of knowledge and skills required by senior staff, supervisors and managers responsible for training. Because it is a partially programmed text it enables those who do not have the opportunity to attend a course to study and practise the basics. It also helps more senior managers to know just what is expected of their supervisors and staff trainers. Third, it can be used as a refresher for those who may have already attended a staff trainers' course. Finally, for those who themselves run staff training courses this makes a concise, easy-to-use guide and hand-out.

This book is not however to be seen as a substitute for attendance at a proper course.

Acknowledgements

My thanks are due to many people, known and unknown, who over the years have contributed the knowledge, experience and material which have made this short book possible. Regretfully, I cannot acknowledge everyone personally. However, I would like particularly to record my gratitude to the Tack Organization and the Industrial Society whose courses I attended and to the HCITB with whom I have collaborated on many occasions.

Introduction

The success of every business depends upon its staff and it has been found that people work most satisfactorily when they have confidence in their employer, in their surroundings and particularly in their own performance of their job.

Obviously no single factor contributes to creating this sense of confidence. But possibly more than anything else, effective induction, that is, the introduction of everything surrounding a person's job, and thorough training in the knowledge and skills necessary to do the job, are responsible for creating the confidence which can lead to a person doing his job in a competent and satisfactory manner. Unfortunately however there are those who feel that systematic training is unnecessary, is too costly, and is beyond their capabilities – or they feel that the ability to train others is something that one is born with. Yet most managers know that a person such as a secretary or a chef, who is skilled in his or her job, is more efficient than an unskilled person. This principle applies equally to the *skill of training* which is distinct from, and additional to, the *job skills* to be passed on. The skilled trainer trains more effectively than the unskilled trainer and, in contrast to the myth that there is not enough time to train, the skilled trainer makes training opportunities throughout the normal working day and will help to create a well-trained employee in a shorter time than an unskilled trainer.

Training others is a skill which can be learned by many normal staff and it makes sound business sense to train key staff, particularly the heads of departments, in this essential skill.

Benefits of training

Training, as with all other activities of an organization, should benefit the organization in the short or long term. These include:

- 1 Increased customer satisfaction
- 2 Increased customer demand
- 3 Better use of time
- 4 Safer working methods
- 5 Reduced waste
- 6 Reduced damage
- 7 Reduced staff turnover.

Hence – more efficiency.

However, because the staff are the people being trained they should also benefit in some way. These include:

- 1 Increased efficiency
- 2 Increased earnings
- 3 Improved job security
- 4 Improved job prospects.

Hence – increased job satisfaction and confidence in the job.

Planning training

If you are to train staff efficiently it will need to be properly planned and in order to do this four main elements have to be considered:

- 1 Who is to do the training?
- 2 What is to be taught?
- 3 How is it to be taught?
- 4 How is it to be judged?

Who is to do the training?

We all know that some people can do a job very efficiently themselves but when it comes to teaching others they are no good at all. This is because to teach others requires certain characteristics which are additional to being able to do the job well.

Anyone who is selected to teach others consequently will need to have certain characteristics. These include:

- 1 Wish to help others
- 2 Sympathetic and patient manner
- 3 Competence in the job
- 4 Understanding of trainees' needs and problems
- 5 Systematic approach to work
- 6 Knowledge and skill of teaching techniques
- 7 Ability to be self-critical.

From this description it is apparent that most trainers will be more mature people, generally employed at some supervisory level. However, this is not always the case as many craftsmen and even more junior staff make excellent trainers; they enjoy the responsibility and often they are in the best position to train their colleagues, and the task of training others can be a valuable step in developing such people for promotion.

As a principle, however, everyone who has to give some form of instruction or coaching during the normal working day should have or should develop some training skills. This applies particularly to every manager and supervisor. A trainer once trained is going to be able to:

- 1 Know what performance is expected of the staff
- 2 Recognize training opportunities and make use of them
- 3 Make training opportunities
- 4 Know which tasks and critical points need to be learned by trainees
- 5 Recognize shortcomings in performance
- 6 Analyse tasks
- 7 Plan training
- 8 Prepare and give instruction
- 9 Produce training aids
- 10 Keep records
- 11 Review training.

What is to be taught?

Training in a business context is concerned with bridging the gap between an individual's capabilities and the employer's requirements. This gap is a *training need*. Put this way it sounds simple but in practice it can be quite difficult. This is because what a person needs to bring to a job is a mixture of:

- General knowledge
- Technical knowledge
- Aptitudes
- Attitudes Skills.

Training needs, apart from consisting of knowledge, skills and attitudes, occur at different times in the working life of employees and organizations. For example when:

- A new employee starts
- Changes take place
- Things go wrong.

When a new employee starts

Of course a whole range of things need to be known. You should include items from each of the following:

- Relationships between staff and departments
- Hours and other conditions
- Safety and security practices
- Rules and regulations
- Methods of work.

When changes take place

A person needs training when the following occur:

- Changes in methods, products or standards of performance
- Changes in equipment
- Transfers and promotions.

When things go wrong (remedial training)

A person may need training when any of the following occur:

- Unsatisfactory trading results or standards
- Customer complaints
- Breakages, waste.

What can be taught?

Some things, such as knowledge and skill, can be transferred to most reasonable trainees quite easily given adequate training expertise on the part of the trainer.

Attitudes, on the other hand, are very difficult and in many respects it is better to aim to select people with the attitudes you want rather than to attempt to 'instil' attitudes into unwilling employees. If, for example, a person resents serving others, it is unlikely that you will have the time and psychological expertise to change his attitudes. Much better to avoid recruiting him in the first place. It is apparent therefore that most training should be concerned with transferring knowledge and skills. To do this the trainer will need to examine his own knowledge and skill and break it down so that he is completely aware of what he has to put over.

This process – job analysis – can be vital, because most skilled people take for granted large parts of their own knowledge and skill.

The managers' responsibility

These different activities have to be set in motion and monitored constantly by management. And as with most other management processes it is a cyclical one starting and finishing with the planning stage.

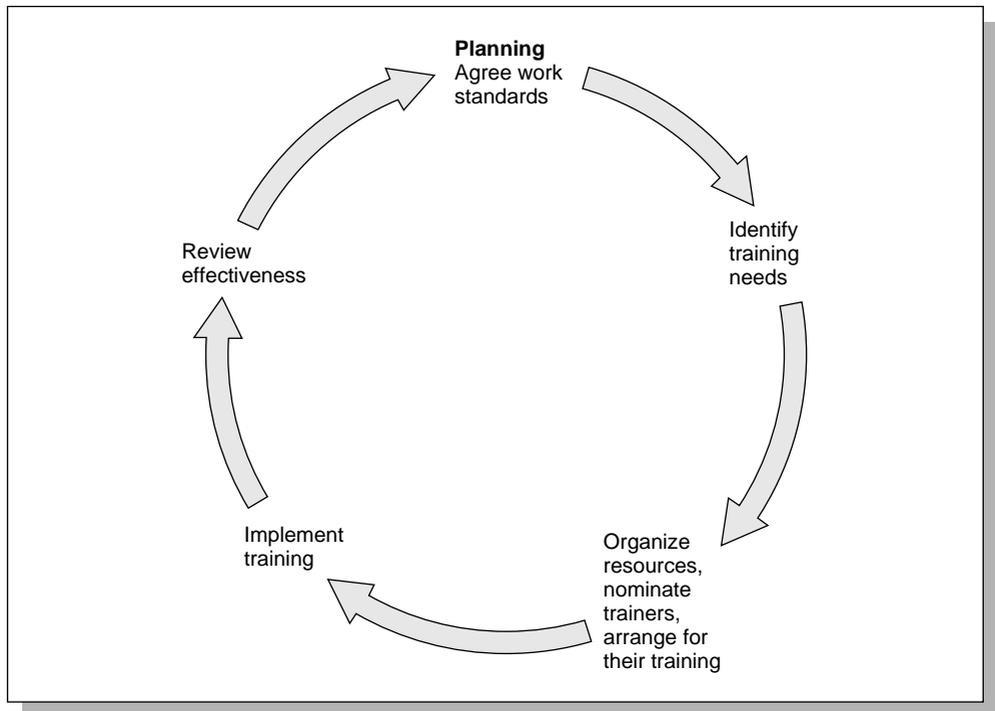


Figure A4.1 The manager's responsibilities

The manager responsible for training must:

- 1 Set training objectives. To do this, job descriptions may be needed and these will, so far as possible, set standards of performance. For example, if a person is expected to attend to twenty people in an hour, then the trainer should use this standard as his training objective and set progressively more difficult targets during the programme.
- 2 Select trainers and, where appropriate, he will arrange for them to be trained in training skills. Maybe he should be the first to attend such a course.
- 3 Delegate training responsibilities.
- 4 Provide training facilities such as rooms, equipment and training aids.
- 5 Inform staff of any changes and any training to be given to cope with changes.
- 6 Show that he really believes in training by participating in it himself.
- 7 Review the effectiveness of training by checking upon the work of people who have finished their training and occasionally by interviewing some or all of them or having informal chats with them to obtain their views on the training they received.

What is to be taught?

What has to be taught?

The types of factors staff may have to learn have been listed. One of the problems, however, of teaching others is that the experienced person automatically (even subconsciously) does many things which the trainee is going to have to learn step-by-step. A good example is the difference between a novice driver, who consciously thinks about each element of driving, and the expert who integrates each element unconsciously into the total driving process. Consequently, to be sure that all points are taught the trainer needs to use a systematic process for listing everything that is going to be taught.

If this is not done, many points, sometimes essential or even vital, may be overlooked in training. The omission will then only be highlighted when the trainee (or ex-trainee) does something wrong – possibly with expensive consequences for the employer. Unfortunately in these circumstances the trainee and not the inadequate training is usually blamed.

Here is a simple job broken down into duties.

A room-maid's duties:

- 1 Collection of guest departure list, and early morning tea and breakfast lists and keys from head housekeeper's office
- 2 Service of early morning tea and breakfasts in bedroom
- 3 Preparation of trolley for servicing rooms
- 4 Servicing of bedrooms
- 5 Servicing of bathrooms
- 6 Checking of all appliances
- 7 Checking of all literature
- 8 Final room check
- 9 Reporting back to housekeeper.

Task analysis

After this the duties may be broken down into tasks. Some tasks may be very simple to learn and they may not need to be broken down further. Such tasks usually draw upon a person's knowledge and skills which have been acquired in every day life (the life skills).

Servicing a bathroom . . .

- 1 Check quantity and take out dirty linen, leave outside bathroom on floor.
- 2 Check, empty and clean bin and ashtray, remove dirty soap.
- 3 Wash bath, tiles, clean all chrome fittings, mirrors and lights.
- 4 Wash toilet bowl, 'U' bend, seat and lid, wash tiles behind toilet and air vent.
- 5 Put toilet cleanser in bowl and leave.
- 6 Clean basin and top of vanity unit then wash and dry drinking glasses after washing hands.
- 7 Replenish soap, towels, bathmat, disposal bags and toilet paper according to room quantities list.
- 8 Wash bathroom floor and door, wipe bath and wash basin pipes.
- 9 Replace bin also checking that shave socket is off.
- 10 Quickly check around and take out dirty linen to maid's trolley.

More difficult tasks, however, will need to be analysed into the various steps in order to identify exactly what a person has to learn and what he has to avoid. This is called 'task analysis'.

Task analysis – the main elements

Task analysis consists of:

- 1 *Listing WHAT is done*
This should be one word or a brief phrase describing each distinct step:
Greet guest
Take glass
- 2 *Describe HOW the action is performed*
This should be a brief description of how each step is carried out starting with:
by taking . . .,
by saying . . .,
- 3 *Describing CRITICAL points*
This should describe signs which inform the person carrying out the task that it is going well or otherwise. Such points should consist of sentences or phrases such as:
Check that totals cross-cast
See that the sauce has not curdled
- 4 *Adding any additional points that should be taken into account, such as security, safety, sales promotion.*

Note: This is omitted in some task analyses.

Lesson plans

Once the job has been broken down into the key words or phrases which list all the tasks, and once complicated tasks have been broken down into analysed tasks – the next step is to put all this knowledge and skill into a planned training session.

Not only does the trainer have to analyse and then organize what he is to transfer, but also he has to consider how he is going to:

- 1 Motivate his trainees to learn.
- 2 Present the knowledge and skill so that it is assimilated.
- 3 Give his trainees the opportunity to ‘cement in’ or consolidate the new knowledge and skills.
- 4 Ensure that what he has been attempting to transfer has been transferred permanently.
- 5 Motivate his trainees to use what they have learned.

These processes are incorporated into what is generally called a lesson plan. A lesson plan consists of:

- Introduction – motivate to learn
- Development – transfer knowledge
- Consolidation – make it permanent
- Close – motivate to use it

What	How	Critical point	Additional information
List each key step or stage, using short phrases starting with words such as: write, greet, cut, dispense	Describe concisely the method to be used; start sentences with words such as: by writing by greeting by cutting by dispensing	Describe the critical signs which indicate that the operation is proceeding satisfactorily or otherwise. Use words which encourage a trainee to use his senses; look for, feel, taste. This column includes elements which involve using the senses in order to make judgements.	Add any additional information which may be necessary for the satisfactory performance of the task or to enhance a normal performance. This column is omitted in some task analyses.
For example, take a glass	For example, by taking a 6 oz Paris goblet by the stem	For example, check that the glass is clean and undamaged	—

Figure A4.2 Task analysis sheet

What is done?	How is it done?	Critical points (see/feel/smell/listen/taste)	Additional information
Select a grapefruit	By handling.	Feel for firmness—weight. Look for bruising.	
Cut off ends	By cutting downwards, on to a board with an 8 inch stainless steel knife across growing end, judging thickness of skin.	See the flesh is exposed. See and feel the fingers are bent away from knife.	Safety. Effect of acid on steel.
Cut off skin	By placing the fruit on end and cutting downwards, using all the blade of the knife, following the shape of the fruit. Turn after each cut.	See and feel the knife is cutting between the flesh and the pith.	Wastage.
Remove remaining pith	By lightly cutting downwards, using tip of knife.	See no pith remains on fruit. See any over-ripe patches are removed.	Bitter taste of pith.
Clear the waste	By scraping into bowl with hand.		Tidy work place. Safety
Segment grapefruit	By gently cutting between the membranes, with a stainless steel paring knife, using a 'V' cut for the first two large segments, then an in-out cut for the remainder and pulling the membrane out of the way with the thumb of the hand holding the fruit. Remove any pips while cutting to aid removal of unbroken segments.	Feel tough pith in centre. See all pips are removed.	
Remove excess juice	By hand squeezing what juice is left into bowl.	Feel 'skeleton' free from juice. See no pips fall into bowl.	

Figure A4.3 Task analysis work sheet preparing grapefruit segments

Source: Reproduced by permission of the HCITB.

The introduction

The introduction is concerned primarily with motivating the person to want to learn. It should be used to:

- 1 Establish a personal contact with trainees.
- 2 Reduce their nervousness.
- 3 Overcome any particular worries they may have, such as: when the training finishes, what it covers, what will be expected of them.

Unless the introduction is effective the trainee may not be receptive to what is to follow. To help in preparing the introductory phase a useful mnemonic or memory aid has been used by people for many years. It is:

I interest
 N need
 T title
 R range
 O objective.

Interest

The first thing anyone communicating with others has to do is to attract their attention. This can be done in one of many ways, including:

- Making a personal connection between the trainee and the subject, for example, giving a taste or sample, and giving them useful information or news.
- Telling a funny story.
- Referring to something topical. Referring to (or inventing) something relevant from one's own personal experience.
- Stating something with an apparent contradiction, for example coffee is more important than caviar.
- Asking questions.
- Giving a demonstration or showing something relevant.

Whatever method is used, however, it should be relevant to the trainee and what is being taught.

Need

The need for the training session should be explained. This should be in two parts, from the employer's point of view and the employee's, but it is essential to emphasize why the trainee needs the training and what benefits he or she will receive.

Title

Obviously the trainee will need to know what is to be taught – usually this is incorporated early on and can be linked with one of the other elements of the INTRO.

Range

The trainee needs to know what is to be covered in the training session and sometimes it is equally important, in order to keep his attention or to reduce his anxiety, to tell him what is not to be covered. It is useful to link back to previous training sessions in order to check, to build confidence and to build on known material.

Objective

Finally the trainee needs to know what he will know or what he should be able to do as a result of the session.

While these five separate elements should be in an introduction, they may be combined skilfully into one or two sentences or, if the training is a long course, the introduction could take thirty minutes or more.

Development

The development stage is the main part of any training session and contains everything to be learned during the session. This should be organized so that:

- 1 Everything is in a logical sequence.
- 2 The trainer starts with a quick review of what the trainee knows so that the trainee starts from the known – and therefore feels confident – moving on to the new, the unfamiliar, material.
- 3 Essential material is picked out ensuring that it is covered, and desirable material is identified – to be covered if the time or opportunity presents itself.

The development stage is concerned with transferring the instructor's knowledge and skills to the trainee. It is, however, rather like serving a meal. The food has to be treated in certain ways to make it appetizing and digestible. In the same way any knowledge and skills to be transferred have to be presented so that they interest the trainee and are retained permanently by him.

There are a number of important rules which will help the trainer to prepare and present his material so that this happens, and these are covered in more depth on pages xxx–xxx.

Consolidation and close

Throughout a training session the trainer must use various means of assisting his or her trainee to learn. One major technique is the correct use of questions and this is covered on pages xxx–xxx. It is vital, however, that at the end of a session the trainer:

- 1 Tests that the training objectives have been achieved by questioning, testing or observing.
- 2 Reinforces the instruction by recapitulating and questioning so that key points will not be forgotten.

In addition to testing the effectiveness and reinforcing the instruction the instructor should also make quite clear what is now expected of the trainee in work terms and he will also arouse interest in the next session by explaining:

- 1 What it is about.
- 2 When it will be.
- 3 What the objective is.

A useful form for planning a lesson is as shown below.

<i>Subject:</i> Preparation and use of a room-maid's trolley	<i>Aim:</i> At the end of this session trainees will be able to: 1 Prepare their trolley for use 2 Recognize and know the use of all the contents of the trolley	<i>Time:</i> 30 minutes
<i>Key point</i>	<i>Detail</i>	<i>Aids</i>
Cleanliness of trolley	Emphasize that a clean trolley is necessary in order to ensure that clean linen is not made dirty	The actual items Questions
Linen	Show the different types of linen and how the number of each is arrived at, to include: towels sheets pillow cases	The actual items Questions
Cleaning	Show the different cleaning materials and explain what each is used for, to include: lavatory cleaner bath and basin cleaner floor polish	The actual items Questions

Figure A4.4 Lesson plan

The learning 'sandwich'

Every piece of instruction should be a sandwich consisting of a slice of motivation; motivating to want to learn; the filling; the main body of the instruction; a slice of motivation; motivating to want to use what has been learned.

How do we learn?

The ability of people to learn is dependent to a great extent upon their reasons for wanting to learn something. If someone is very keen to learn, he will apply himself. On the other hand, if he is not keen to learn, he will almost certainly bring little enthusiasm to the learning process.

Why do people learn?

Obviously there are many reasons for people wanting to learn and in a work setting these will be closely linked to why people work. If the trainer knows and understands why each individual wants to learn, he or she should be able to use this to motivate the person – and keep his or her interest. To attempt to treat all people in the same way is certainly not the way to being a successful trainer or supervisor. A key supervisory and training skill therefore is to discover what motivates each of his or her subordinates or trainees.

If a generalization is to be made, however, the main reasons are likely to be one or more of the following:

- 1 To obtain rewards such as pay, promotion, esteem.
- 2 To avoid punishment such as dismissal, reprimand, loss of esteem.
- 3 Interest.
- 4 Curiosity.

How do people learn?

Learning is the process of acquiring knowledge, skills and attitudes. It occurs when knowledge, skills and attitudes are transferred to the learner from other people or situations. The transfer is through five primary senses and is best when as many senses as possible are used – particularly in combination. For example, in teaching a person to cook it is possible merely to give him detailed recipes but the results are not likely to be edible! In addition to the recipes, however, the trainee would watch demonstrations and the results are likely to be an improvement. But to involve the trainee fully so that he sees, hears, smells, touches and tastes, is the best and only effective way of teaching cookery.

We learn: 1 per cent with our sense of TASTE
1.5 per cent with our sense of TOUCH
3.5 per cent with our sense of SMELL
11 per cent with our sense of HEARING
33 per cent with our sense of SIGHT.

(Source: Industrial Audiovisual Association, USA)

The transfer is made more effective by ensuring that:

- 1 The amount and type of material is suited to the person being trained. Frequent, short sessions are much more effective than infrequent long ones.
- 2 It is transferred in logical, progressive steps, building on the known.
- 3 The methods and choice of words used must suit the capabilities of the trainees.

How do we remember?

We remember: 10 per cent of what we READ
20 per cent of what we HEAR
50 per cent of what we SEE and HEAR
80 per cent of what we SAY
90 per cent of what we SAY and DO simultaneously

(Source: Industrial Audiovisual Association, USA)

In addition, trainers must recognize that there are many factors which inhibit a person's ability or desire to learn and consequently a trainee will have difficulty learning if he is:

- 1 Nervous, tired or frightened.
- 2 Worried about his or her job, money, family.
- 3 Distracted by noise, interruptions.
- 4 Uncomfortable, too cold, too hot.

So far as the training session itself is concerned people will not get the most out of it if they are bored by:

- 1 The trainer's style, tone and language
- 2 The length of the session
- 3 The content.

The rate at which people learn varies from person to person but most people learn in steps – sometimes making rapid progress and sometimes appearing to make very little progress at all. This is quite natural and a good trainer will recognize this and he will know when a trainee is stuck and needs sympathy and help rather than badgering. A trainer's main duty is to build up confidence and this will only be achieved by sympathy and understanding. Criticism and lack of patience reduce confidence and only slow down the learning process.

Question technique

A trainer can make use of questions in three main ways. These are, to test a person's level of attainment (test question), to stimulate a person to 'learn for himself or herself' (a teaching or extension question), and thirdly to generate understanding and exchange of information and attitudes between members of a group by tossing questions and answers back and forth (bonding questions).

Questions may be used principally for:

- 1 Testing the level of attainment before a 'training' session.
- 2 Testing the effectiveness of training.
- 3 Helping people to work out answers for themselves, thus teaching themselves.
- 4 Encouraging an exchange of knowledge and information, in a group.
- 5 Obtaining or focusing interest.
- 6 Maintaining interest.
- 7 Creating understanding between the group, and between the group and the instructor.

Question structure

Questions generally are more effective when they are 'open-ended'. This encourages a person to think for the answer. Where questions give simple alternatives or anticipate yes or no, less thought is required by the trainee and the question consequently is less effective both in testing and in consolidating learning. Most questions should contain why, where, when, what, who or how.

Questions, particularly teaching questions, should be planned beforehand – and should relate particularly to the ‘critical points’ identified in the ‘task analysis’ stage.

Where questions are not answered satisfactorily by the trainee, the trainer must consider first if the question was properly framed and understood. If not the question should be rephrased and put again. If the question still remains unanswered the trainer must consider whether the training he has given is satisfactory or not.

Putting questions (the three Ps)

When questions are put to a group of people this should be done in a way which encourages everyone in the group to participate. This is achieved by:

- 1 Putting the question – without naming anyone to answer it.
- 2 Pausing so that everyone thinks about the question and answer.
- 3 Pointing out who is to answer the question.

Aids to training

Because people learn most easily by using a variety of their senses and their different faculties, trainers should always attempt to support their own instruction with training aids. These include visual aids such as blackboards and film slides and audio aids such as tape recorders. They should only be used to:

- Support but not substitute
- Simplify complex instruction
- Emphasize
- Interest
- Aid memory.

Training aids ideally should be the real thing, but in some cases the equipment or procedures may be too complex for a clear explanation, so a diagram may help. The preparation of training aids should be carefully planned to support the instruction given.

Training aids include:

- Actual equipment or equipment specially modified for training purposes
- Drawings and diagrams
- Films, slides, recordings
- Graphs and charts.

Recently, for various reasons, the need for job descriptions and similar documents has grown considerably with the result that many employers – even small ones – now use such documents as an essential tool of effective management. Unfortunately these documents are rarely used for training purposes although with a little forethought they can be designed to serve the purpose of:

- 1 Job descriptions
- 2 Instructor’s training programme and checklist
- 3 Trainee’s training programme and checklist
- 4 Work manual.

Job aids

Many jobs can be made easier with descriptions of the methods or procedures to be employed. Such descriptions may be called job aids.

Job aids can be of value to the experienced worker as a reference, and to the trainee as a learning aid. As such, they can substitute for parts or all of certain training sessions because they enable trainees to teach themselves and they can relieve the trainees from having to attempt to memorize unnecessarily.

Job aids can be used:

- 1 Where supervision is minimal.
- 2 Where procedures are changed.
- 3 Where company standards need to be adhered to.
- 4 Where mistakes cannot be risked.
- 5 When memory needs assistance because of the complexity of a procedure, or the infrequency of its use.
- 6 Where staff may speak limited English but where a drawing or a design will describe what is required.

Job aids include:

- 1 Diagrams
- 2 Photographs
- 3 Price lists, menus
- 4 Procedural instructions, recipes.

Introducing staff to a new employer

How do people feel?

Most people approach a new job feeling nervous and worried. Sometimes this is quite apparent. In other cases, however, it is well-concealed. But whether it is obvious or not, until people have settled into an organization they will be nervous or worried and this will influence their ability to learn their job – to do it effectively and in particular to get on with their colleagues, supervisors and customers. They will not have the feeling of confidence which is essential to their being able to do a good job.

Success during the first few days in a new job is vital and while most managers admit this less than 10 per cent of managers in some industries actually carry out a formal induction of new employees.

What a job consists of

Induction is not something that takes place on the first morning of a new job, it can be a relatively long process, with some people taking many weeks to settle in. This is because every job has two parts to it. First, there is the work itself and secondly, there are all the peripherals to the job including conditions and social contacts.

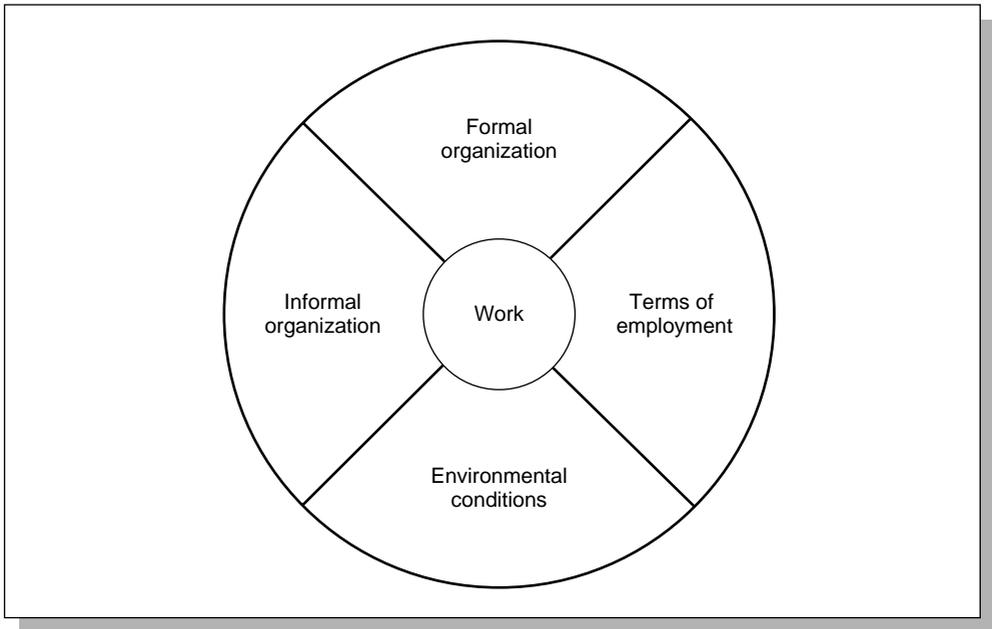


Figure A4.5 The main elements of a job

People will not be able to cope with the work part of their job unless they understand and are reasonably happy with the surrounding elements. These include:

- 1 Location and physical layout
- 2 Conditions of employment and contracts
- 3 Company and house rules
- 4 Customers
- 5 Management, supervision and formal relationship
- 6 Colleagues and informal relationships.

The induction process is concerned with introducing an employee to all these elements as quickly as possible so that he or she need not worry about them any more. This enables the trainee to concentrate on the work which is the main purpose of the job rather than having to learn and worry about all the elements surrounding the work.

Benefits of induction

The employer benefits from effective induction by:

- 1 Reducing staff turnover
- 2 Improving staff efficiency and work standards
- 3 Improving staff morale.

The employees benefit by:

- 1 Fitting in and feeling a part of the team.
- 2 Being accepted as part of the team.
- 3 Becoming competent and hence confident in the shortest possible time.

Every organization will need to induct its employees in its own particular conditions, rules and methods, so no example can cover all circumstances. However, the checklist below shows the type of subjects that need to be covered. This, however, shows only the formal aspects of induction, and managers and supervisors should ensure that newcomers are inducted into the informal aspects as well. By definition, however, this can rarely be done by managers or supervisors. Instead, what they need to do is to put a newcomer under the wing of a 'sponsor', that is someone who 'knows the ropes'. This person may well be the newcomer's trainer also.

Checklist for induction programmes:

- | | | | |
|--|--|---|---------------------|
| 1 <i>Documentation</i>
Are the following points covered? | Name
Next of kin
Tel. no.
P45 | Address
Name
National Insurance no.
Bank address | Tel. no.
Address |
| 2 <i>Information</i>
Are the following departments informed? | Wages/Pensions/Insurance/
Personnel/Training/etc. | | |
| 3 <i>Terms of employment</i>
Are the following explained and understood? | Hours of duty/Meal breaks/Days off/
Method of calculating pay/Holiday arrangements/Sick leave/Pension scheme. Grievance procedures.
Rights regarding trade unions and Staff Association
Additional benefits such as Group Insurance rates or other discounts. | | |
| 4 <i>History and organization</i>
Are the following explained and understood? | Origin and development of the organization. Present situation/objectives. | | |
| 5 <i>Establishment Organization</i>
Are the following explained and understood? | Layout of establishment including toilets, showers, etc.
Names of relevant supervisors and colleagues, introduction where necessary, to supervisor, shop steward, etc. | | |
| 6 <i>Rules and regulations</i>
Are the following explained and understood? | (a) Statutory; licensing laws and hours, food hygiene, Innkeepers Liability Act, etc.
(b) Company rules; punctuality, drinking, smoking, appearance, personal business, use of employer's property, etc. | | |
| 7 <i>The job</i>
Are the following explained and understood? | Purpose/methods/training needs | | |

When things go wrong, who can help?

Frequently, when things go wrong, management and supervisors jump to quick conclusions regarding the cause. Quick conclusions are often wrong conclusions which lead to wrong solutions. Wrong solutions obviously do not solve the problem and frequently they do the reverse by aggravating people who recognize what is the real cause and just how ineffective is the solution.

Correcting errors depends upon the correct diagnosis of what causes things to go wrong. The correct procedure for putting things right consists of:

- 1 Identifying a fault as a variation or departure from a standard of performance which may be either specified verbally, in writing or by custom and practice.
- 2 Identifying the cause or causes.
- 3 Identifying the person or persons responsible. The person committing the error may not be at fault, but rather the person who issued the order or trained the person responsible.
- 4 Deciding what action to take, how to communicate this action and how to motivate the person who may take the new instructions as a criticism.
- 5 Deciding how to prevent a repetition.

Heads of departments and other senior staff are responsible for the prevention and correction of faults. They should, therefore, pay particular attention during training to 'critical points', that is, the points at which things could go wrong.

This book* is designed to assist managers and heads of departments to understand more clearly the knowledge and skills they need to bring to their responsibility in training their staff. The book, however, cannot substitute for thorough practical and theoretical training in the techniques of training because, as the book itself says, effective training makes use of various methods to transfer and consolidate knowledge and skill. Consequently the best way to become an effective trainer and supervisor, having attended a proper course on the subject, is to practice and to be critical always of one's own performance.

'There are no bad staff, only bad managers'

* *How to get the best from Your Staff.*