Surviving Troubled Times: Five Strategies for Training Professionals

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Scaling New Heights, Delivering Results
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So Why Are You Here?
Why Are We Here?

- Training should provide an acceptable return for a reasonable cost over a stated time
- Requires us to:
  - Think strategically
  - Plan carefully
  - Work collaboratively
Does This Really Matter?

Immediate Transfer - %
- Not transferred: 38%
- Transferred: 62%

Transfer at 6 months - %
- Not transferred: 56%
- Transferred: 44%

Transfer at 12 months - %
- Not transferred: 66%
- Transferred: 34%

--Saks and Belcourt (2006)
Does This Really Matter?

*Training Is a $56.2B Industry*

**Immediate transfer - $$**
- Transferred $34.84B
- Not Transferred $21.36B

**Transfer at 6 months - $$**
- Transferred $24.73B
- Not Transferred $31.47B

**Transfer at 12 months - $$**
- Transferred $19.11B
- Not Transferred $37.09B

--Saks and Belcourt (2006)
*Training (2008)*
Our Goals

- Give you tools and techniques
- Facilitate dialog – questions are always welcome
- Facilitate practice

Related to …
5 Best Practices for Troubled (Any) Times

① Align Efforts & ② Close Skill Gaps

③ Use Job-Focused Objectives ④ Create Sound Training Programs

⑤ Collaborate Across the Organization

Warning: These practices are simple on the surface and devilishly hard to do.
Aligning to Close Skill Gaps

“What Sponsors Ask For” can mean just about anything (Table 3).

Sponsors want to meet formal and informal missions and business goals (Table 1).

What do people need to do to perform in ways that meet business goals?
Joe Harless and the Training Curmudgeon Hat

Joe Harless

- “Sure, we can help you with that!”
- “Call it what they want but deliver what they need.”

The Training Curmudgeon Hat

- Training is the last resort.
- Prove you have exhausted all other possible options!
Align training with what sponsors care about.

Training is a special case of HPT.

75.6% of all performance gaps

10.5% of all performance gaps
Demonstration

- PCA Template Walk-through (p. 2)
- Worked Example: Team Lucky PCA (p. 4)
Practice 1

Aligning to Close Skill Gaps

1. Work in groups of four or so.
2. Read the RVMart Trailer Hitch Sales Scenario (p. 7)
3. Use the Performance and Cause Analysis Template (p. 2) to complete a team analysis.
4. Select a representative to report your findings.
Practice 1
Aligning to Close Skill Gaps

- State the business goal (organizational analysis).
- Specify a performance gap.
- Identify causes of the performance gap arising from a lack of environmental supports.
- Identify causes of the performance gap arising from a lack in the repertory of behavior.
Guiding Principles
Aligning to Close Skill Gaps

- If you want people to value your work, focus on what they value.
- Put on your Training Curmudgeon hat.
- Assume but verify.
Collaborating with Others

Aligning to Close Skill Gaps

Think about a training program you’re working on now or have recently completed:

- Who might you collaborate with?
- What are the obstacles and enablers for effective collaboration?
Job-Focused Objectives

① Align Efforts & ② Close Skill Gaps

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Training and Job Performance

It’s All about Building Bridges

- Training should promote learning and transfer.
- Transfer depends on important similarities
- “Fight like you train; train like you fight.”

Learning Environment

Performance Environment
Tasks and Authentic Learning

- One way to promote transfer is to create learning situations that are “authentic”
- Authentic = having some connection to real-life problems students will encounter outside of their training programs
- Requires aligning components of the instruction
Writing Objectives

Brief review – 3 components in an objective

1) Performance
   What do you want people to do?

2) Conditions
   Under what circumstances will they do that?

3) Criteria
   What defines doing it well?
Writing Job-Focused Objectives

Think “on the job”

1) Performance
   What do you want people to do on the job?

2) Conditions
   Under what circumstances will they do that on the job?
   (includes cues and resources)

3) Criteria
   What defines doing it well on the job?

Objectives should describe what exemplary performers are doing on the job as they perform a task.
Why Bother?

Objectives are our North Star

An essential navigation aid that
☆ Points the way
☆ Helps everyone stay on course

Including
☆ Instructional designers
☆ Instructors
☆ Learners
☆ Clients
Demonstration

- Objective Template Walk-through (p. 9)
- Objectives Worksheet (p. 10)
- Objectives Checklist (p. 11)
## Demonstration

**Sample Job-Focused Objectives**

<table>
<thead>
<tr>
<th>Performance</th>
<th>Conditions</th>
<th>Criteria</th>
</tr>
</thead>
</table>
| Marketing personnel will create an ad campaign | • A product launch  
• Authorization | • Meet targeted goals  
• Within schedule, scope, and budget |
| Nurses will administer drugs         | • A physician’s orders  
• Necessary equipment  
• Prescription administration software | • Right drug  
• Right amount  
• Right time  
• Right patient |
Practice 2

Writing Job-Focused Objectives

1. As an individual, use the Objectives Template (p. 9) to write a job-focused objective.

2. Use the worksheet (p. 10) and checklist (p. 11) to check your objective.

3. Share your objective with several neighbors.

4. Use the worksheet and checklist to check each objective.

5. Select a representative to report one of the objectives from your group.
### Practice

**Your Job-Focused Objectives**

<table>
<thead>
<tr>
<th>Performance</th>
<th>Conditions</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale recommend disability</td>
<td>When (cue):</td>
<td>• Working clients 21-25 of age</td>
</tr>
<tr>
<td>insurance policies to clients</td>
<td>• Clients want financial security</td>
<td>• Bring up the opportunity 50% of the time</td>
</tr>
<tr>
<td></td>
<td>Using</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Tools(?)</td>
<td></td>
</tr>
</tbody>
</table>
## Practice

### Your Job-Focused Objectives

<table>
<thead>
<tr>
<th>Performance</th>
<th>Conditions</th>
<th>Criteria</th>
</tr>
</thead>
</table>
| OFAC agents decide whether to pass or escalate a transaction | When (cue):  
  - Application(s)  
  - Loud environment Using  
  - GFP software   | • Correct trigger about suspect information (country, investment, etc.)  
• Within 45 seconds |
| Seek suspect information                        |                                                 |                                                   |

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Guiding Principles

*Writing Job-Focused Objectives*

- On the job, on the job, on the job.
Collaborating with Others

Writing Job-Focused Objectives

Think about a training program you’re working on now or have recently completed:

- Who might you collaborate with?
- What are the obstacles and enablers for effective collaboration?
Creating Sound Training Programs

① Align Efforts & ② Close Skill Gaps
③ Use Job-Focused Objectives
④ Create Sound Training Programs
⑤ Collaborate Across the Organization

Warning: These concepts are simple on the surface and devilishly hard to do.
Merrill’s First Principles (2002) (p. 12)

Integrate
- Watch
- Reflection
- Creation

Activate
- Previous experience
- New experience
- Structure

Problem
- Whole task
- Encountered on the job

Apply
- Practice consistency
- Diminishing coaching
- Varied problems

Demonstrate
- Demonstration consistency
- Learner guidance
- Relevant media
Most Training Programs

Information → Practice

Result
A Modest Proposal

Information → Practice

Result

Skills

Skills
Demonstration

- Merrill’s First Principles Job Aid (p. 12).
- Detailed Instructional Plan Template Walk-Through (p. 14).
- Team Lucky Detailed Instructional Plan (p. 16)
Practice 3

Creating Training for Transfer

1. Work in groups of four or so.
2. Read the Team TAG’s Detailed Instructional Plan (p. 20)
3. Use the Detailed Instructional Plan Template (p. 14) to create an application sequence and test it against the corollaries.
4. Select a representative to report your findings.
Practice 3
Creating Training for Transfer

- Specify 2 or 3 practice activities that progress in difficulty, using 1 or 2 sentences each.
- Revise the practice activities to systematically reduce the guidance and feedback provided.
Guiding Principles

Creating Training for Transfer

- On the job, on the job, on the job.
- Emphasize authentic practice.
- Extend integration activities to the workplace.
Collaborating with Others

Writing Job-Focused Objectives

- How might you apply these principles?
- Who might you collaborate with?
- What obstacles/enablers would you need to navigate?
5 Best Practices for Troubled Times

Integration

1. Align Efforts & Close Skill Gaps
2. Use Job-Focused Objectives
3. Create Training Promoting Transfer
4. Collaborate Across the Organization

Warning: These concepts are simple on the surface and devilishly hard to do.
What are your walk-away messages (WAMs) from this session?
Making the Case

- Meet business goals by closing skill and other performance gaps.

- Pitch “helping others perform their jobs like our best”—instead of “training.”

- Promise that learners will do in their training what they do on the job:
  - Recognize situations.
  - Make decisions.
  - Solve problems.
  - Collaborate with others.

- Ask for sponsorship:
  - Measures
  - Resources
  - Exemplar release time
  - Management support for transfer
Thank You for this Opportunity!

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