CHAPTER 7

TRAINING EMPLOYEES

After reading this chapter, you should be able to:

What Do I Need to Know?

1. Discuss how to link training programs to organizational needs.

2. Explain how to assess the need for training.

3. Explain how to assess employees' readiness for training.

4. Describe how to plan an effective training program.

5. Compare widely used training methods.

6. Summarize how to implement a successful training program.

7. Evaluate the success of a training program.

8. Describe training methods for employee orientation and diversity management.

❧ INTRODUCTION

The problem facing Espresso Connection was that sales were flat. The chain of drive-through coffee stands, based in Everett, Washington, used a variety of advertising media, but the customers attracted by the ads simply weren't coming back. Espresso Connection's owner, Christian Kar, identified the source of this problem as poor customer service. He decided he needed to teach employees how to impress customers.

Espresso Connection hired several part-time trainers and set up a practice facility. Newly hired employees no longer rely on their coworkers to teach them what to do. Instead, they spend a week in the practice facility, learning to use the equipment, followed by another week of on-the-job training at a store. The first week prepares employees to work fast, a goal that quickly affects Espresso Connection's bottom line. Says Kar, "Our locations are really, really small. Unless our staff really focuses on getting customers through there more efficiently, we quickly would hit a brick wall in terms of revenues." Moving fast also cuts the waiting time for Espresso Connection's customers. The other major goal of the training is to teach employees specific skills related to customer service—for example, keeping the window open while serving customers. A few years after Espresso Connection started the training, the company saw its sales nearly double.[1]

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.

◈ TRAINING LINKED TO ORGANIZATIONAL NEEDS

LO1
Discuss how to link training programs 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, from the use of robots to collaboration on the Internet. The new psychological contract, described in Chapter 2, has created the expectation that employees invest in their own career development. Employees with this expectation will value employment at an organization that provides 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

Figure 7.1

Stages of Instructional Design

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. Training programs may prepare employees for future positions in the organization, enable the organization to respond to change, reduce turnover, enhance worker safety, improve customer service and product design, and meet many other goals. To achieve those goals, HR professionals approach training through **instructional design**—a process of systematically developing training to meet specified needs.

instructional design
A process of systematically developing training to meet specified needs.

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.

LO2
Explain how to assess the need for training.

◈ 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 the three broad areas shown in Figure 7.2:[2]

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

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

Figure 7.2
Needs Assessment

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.

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.

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

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. Recently, this was the situation at Saint Paul, Minnesota, check printer Deluxe Corporation, which had reduced the number of account managers by almost two-thirds after downsizing. Most of those who remained were either new employees or employees who had been with the company for more than 20 years; among both groups, morale was poor. The company decided to combine sales training with efforts to restore employee morale. Two trainers worked with three of the company's top-performing account managers to develop and deliver the training program. Besides learning to shift their focus from selling products to building customer relationships, the account managers learned time management skills. In addition, sales managers and directors learned how to better coach their account managers in the field.[3]

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.

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.[4] 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

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

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. Figure 7.3 is an example of a task statement questionnaire. In this example, the questionnaire begins by defining categories that specify a task's importance, frequency, and difficulty. Then, for a production supervisor's job, the questionnaire lists five tasks. For each task, the subject-matter expert uses the scales to rate the task's importance, frequency, and difficulty.

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.

❧ 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

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

LO3
Explain how to assess employees' readiness for training.

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

Figure 7.3

Sample Task Statement Questionnaire

Name _____ Date _____

Position _____

Instructions: Please rate each of the task statements according to three factors: the **importance** of the task for effective performance, how **frequently** the task is performed, and the degree of **difficulty** required to become effective in the task.

Use the following three scales in making your ratings.

Importance

4 = Task is critical for effective performance.

3 = Task is important but not critical for effective performance.

2 = Task is of some importance for effective performance.

1 = Task is of no importance for effective performance.

0 = Task is not performed.

Frequency

4 = Task is performed once a day.

3 = Task is performed once a week.

2 = Task is performed once every few months.

1 = Task is performed once or twice a year.

0 = Task is not performed.

Difficulty

4 = Effective performance of the task requires extensive prior experience and/or training (12-18 months or longer).

3 = Effective performance of the task requires minimal prior experience and training (6-12 months).

2 = Effective performance of the task requires a brief period of prior training and experience (1-6 months).

1 = Effective performance of the task does not require specific prior training and/or experience.

0 = Task is not performed.

Task (circle the number from the scales above)	*Importance*	*Frequency*	*Difficulty*
1. Ensuring maintenance on equipment, tools, and safety controls	0 1 2 3 4	0 1 2 3 4	0 1 2 3 4
2. Monitoring employee performance	0 1 2 3 4	0 1 2 3 4	0 1 2 3 4
3. Scheduling employees	0 1 2 3 4	0 1 2 3 4	0 1 2 3 4
4. Using statistical software on the computer	0 1 2 3 4	0 1 2 3 4	0 1 2 3 4
5. Monitoring changes made in processes using statistical methods	0 1 2 3 4	0 1 2 3 4	0 1 2 3 4

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

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.[5] 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, establish rewards for learning, and communicate 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.[6] *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.[7]

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. Managers play an especially important role in providing social support. Besides offering positive feedback, they can emphasize the importance of training, show how training programs relate to employees' jobs, and provide opportunities for employees to apply what they learn. Table 7.1 summarizes some ways in which managers can support training. At the minimum, they should allow trainees to participate in training programs. At the other extreme, managers who not only encourage training but conduct the training sessions themselves are most likely to back up training by reinforcing new skills, providing feedback on progress, and giving trainees opportunities to practice.

Support can come from employees' peers as well as from supervisors and managers. The organization can formally provide peer support by establishing groups of employees who meet regularly to discuss their progress. Such a group might hold face-to-face meetings or communicate by e-mail or over the organization's intranet, sharing ideas as well as encouragement. For example, group members can share how they coped with challenges related to what they have learned and how they obtained resources they needed for applying their training. Another way to encourage peer support is for the human resource department or others in the organization to publish a newsletter with articles relevant to training. The newsletter might include interviews with employees who successfully applied new skills. Finally, the organization can assign experienced employees as mentors to trainees, providing advice and support related to the training.

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 7.1
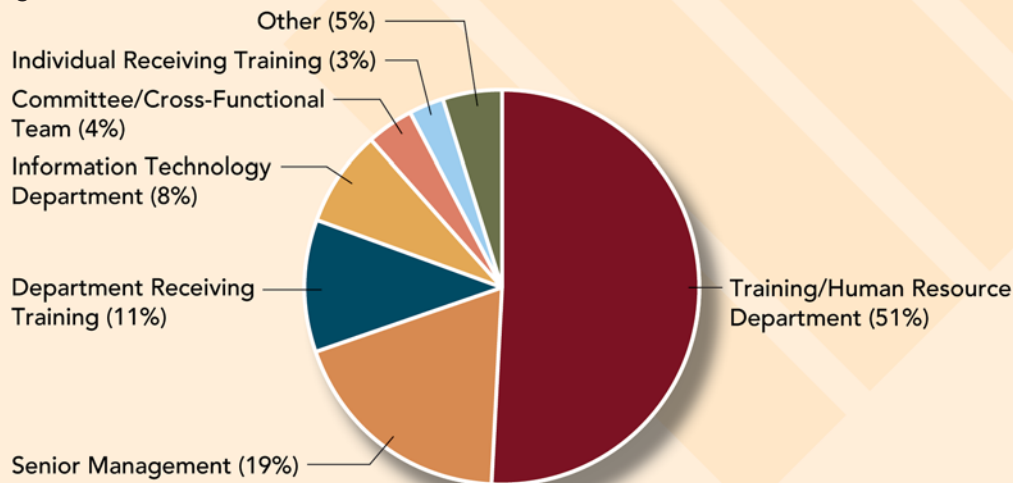
What Managers Should Do to Support Training

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

? DID YOU KNOW?

TRAINING DECISIONS ARE OFTEN HR'S JOB

In a survey of U.S. companies, about half said their training or human resource department controls training purchases. Most others leave the decision up to a senior manager or the department receiving training.

Other (5%)
Individual Receiving Training (3%)
Committee/Cross-Functional Team (4%)
Information Technology Department (8%)
Department Receiving Training (11%)
Training/Human Resource Department (51%)
Senior Management (19%)

Who Controls Spending on Training

SOURCE: Based on Holly Dolezalek, "*Training* Magazine's 23rd Annual Comprehensive Analysis of Employer-Sponsored Training in the United States," *Training,* October 2004, downloaded from Infotrac at http://web5.infotrac.galegroup.com.

LO4
Describe how to plan an effective training program.

PLANNING THE TRAINING PROGRAM

As described in the "Did You Know . . . ?" box, 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.

Companies such as Tires Plus provide intensive training and educational programs for their employees. This company supports training by making resources available. Management has a favorable attitude toward training, which motivates employees to stay with the company and work toward advancement.

Effective training objectives have three components:

1. A statement of what the employee is expected to do (performance or outcome).
2. A statement of the quality or level of performance that is acceptable.
3. A statement of the conditions under which the trainee is expected to apply what he or she learned (for instance, physical conditions, mental stresses, or equipment failure).[8]

If possible, the objectives should include measurable performance standards. Suppose a training objective for a store's customer service training program is: "After training, the employee will be able to express concern to all irate customers with a brief (fewer than 10 words) apology, only after the customer has stopped talking, and no matter how upset the customer is." Here, measures include the length and timing of the apology.

Finally, training objectives should identify any resources required to carry out the desired performance or outcome. This helps the organization ensure that employees will be able to apply what they have learned.

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 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. The "Best Practices" box describes how Intel uses its own program, staffed with contract teachers, to provide language training that meets the objective of better

Noe−Hollenbeck−Gerhart−Wright:
Fundamentals of Human
Resource Management,

II. Acquiring and Preparing
Human Resources

7. Training Employees

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BEST PRACTICES

INTEL BRIDGES THE LANGUAGE GAP WITH TRAINING

Computer-chip maker Intel has a huge workforce: 78,000 employees in 294 offices in 48 countries. Teams at Intel regularly include employees from different cultures working in different locations. At multinational companies, English tends to be the common language that all can use to communicate. But Intel's management knows that even if all employees can use English, misunderstandings can arise, especially among people who usually speak a different language.

At Intel, employees with a business need can take classes in Mandarin (a Chinese language), Japanese, and Spanish at various offices throughout the United States, free of charge. The courses are not designed to prepare employees to work in foreign countries. Instead, they target employees who, through technology, work directly with foreign clients or work on teams with employees from other countries. The classwork is also designed to help minimize the culture gaps within international teams.

The company contracted with an outside firm to provide the optional 12-week courses, taught at three levels. The courses meet for two hours a week and cost the company approximately $300 per person. Employees are allowed to repeat courses.

Marcos Garciaacosta, a business alliance manager at Intel who is based in Arizona, has been taking Japanese classes since he joined the company seven years ago. He says the "ease and flexibility of on-site classes" keep him motivated to continue to learn. And while he says he is far from fluent, he is now proficient enough to communicate better with his business contacts and customers in Japan.

The in-house training approach is not new to Intel. Company spokeswoman Tracy Koon says Intel offered its first language programs in Japanese in the 1980s. But the program remains relatively small. In the first two years of the program, Intel spent $54,000 to train 180 employees in the three languages, a tiny fraction of the workforce. But although the program is small, Intel is receiving some positive results. Kathy Powell, the foundational development manager for Intel University, the division of the company that manages training, says the demand for foreign-

language courses is increasing. Intel plans to expand the language-training program to overseas offices and to train hundreds more employees.

The language classes are part of a larger in-house cultural-training curriculum for Intel employees. The company also offers optional one-day classes with titles such as "Working with Russia" and "Doing Business with the Japanese," which are designed to give employees basic information about how to work with people from other cultures. Classes of about 15 students explore the culture, history, and business practices of companies with which Intel does business. Koon explains, "By having these language and cultural tools at your disposal . . . , you can understand the do's and don'ts of the cultures." She adds, "You're not going to be an effective team if you are constantly offending the other members without knowing it."

SOURCE: Based on G. Weber, "Intel's Internal Approach," *Workforce Management* 83 (2004), p. 49; and K. Kranhold, D. Bileklan, M. Karnitschnig, and G. Parker, "Lost in Translation," *The Wall Street Journal,* May 18, 2004, pp. B1, B6.

communication among its employees and customers. Many companies and consultants provide training services to organizations. Community colleges often work with employers to train employees in a variety of skills. PepsiCo needs highly skilled maintenance workers to take care of the sophisticated machinery at the Gatorade factory

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Resource Management,
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7. Training Employees

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TABLE 7.2

Questions to Ask
Vendors and
Consultants

How much and what type of experience does your company have in designing and delivering training?
What are the qualifications and experiences of your staff?
Can you provide demonstrations or examples of training programs you have developed?
Would you provide references of clients for whom you worked?
What evidence do you have that your programs work?

SOURCE: Based on R. Zemke and J. Armstrong, "Evaluating Multimedia Developers," *Training,*
November 1996, pp. 33–38. Adapted with permission. Lakewood Publications, Minneapolis, MN.

in Tolleson, Arizona. So PepsiCo and a neighboring manufacturer arranged for Maricopa Community College to provide courses in topics such as math and electricity. The college provides the instructor, and PepsiCo company provides the equipment to practice on.[9]

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 such as those listed in Table 7.2.

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. According to estimates by consultants, preparing a training program can take 10 to 20 hours for each hour of instruction. Highly technical content that requires the developer to meet often with experts in the subject can take 50 percent longer.[10]

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. Such 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.

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presentation methods
Training methods in which trainees receive information provided by instructors or via computers or other media.

hands-on methods
Training methods which actively involve the trainee in trying out skills being taught.

group-building methods
Training methods in which trainees share ideas and experiences, build group identity, understand interpersonal relationships, and learn the strengths and weaknesses of themselves and their coworkers.

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 of presentation methods, hands-on methods, and group-building methods.[11]

With **presentation methods,** trainees receive information provided by instructors or via computers or other media. Trainees may assemble in a classroom to hear a lecture, or the material may be presented on videotapes, CD-ROMs, Web sites, or in workbooks. Presentations are appropriate for conveying facts or comparing alternative processes. Computer-based training methods tend to be less expensive than bringing trainees together in a classroom.

In contrast to presentation methods, **hands-on methods** actively involve the trainee in learning by trying out the behaviors being taught. Someone may help the trainee learn skills while on the job. Hands-on methods away from the job include simulations, games, role-plays, and interactive learning on computers. Hands-on training is appropriate for teaching specific skills and helping trainees understand how skills and behaviors apply to their jobs. These methods also help trainees learn to handle interpersonal issues, such as handling problems with customers.

Group-building methods help trainees share ideas and experiences, build group or team identity, understand how interpersonal relationships work, and get to know their own strengths and weaknesses and those of their coworkers. The various techniques available involve examining feelings, perceptions, and beliefs about the trainees' group. Participants discuss how to apply what they learn in the training program to the group's performance at work. Group-building methods are appropriate for establishing teams or work groups, or for improving their performance.

Training programs may use these methods alone or in combination. An organization that has blended its training approaches is CAN, a Chicago-based company with employees located across the United States and Canada. Live seminars kick off a course and conclude it. In between are online case studies, question-and-answer sessions, and simulations. Trainees work in teams of 10 people. They communicate with each other through chat rooms, threaded discussions, and virtual meetings. The instructor is available to answer questions online. Trainees may be asked to put ideas into practice and then submit updates and questions using message rooms. Coaches and mentors guide the trainees to additional reference materials as needed. The trainees complete an accountability plan summarizing actions they will take to show their managers they have met their objectives for the course.[12] 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 7.4 shows the percentages of companies using various training methods: classroom instruction, seminars (face-to-face and remote), self-study, role-plays, case studies, learning games, experiential programs. Of these methods, the most widely used are traditional classroom training, public seminars, self-study online, and case studies.

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, dis-

Figure 7.4

Overview of Use of Instructional Methods
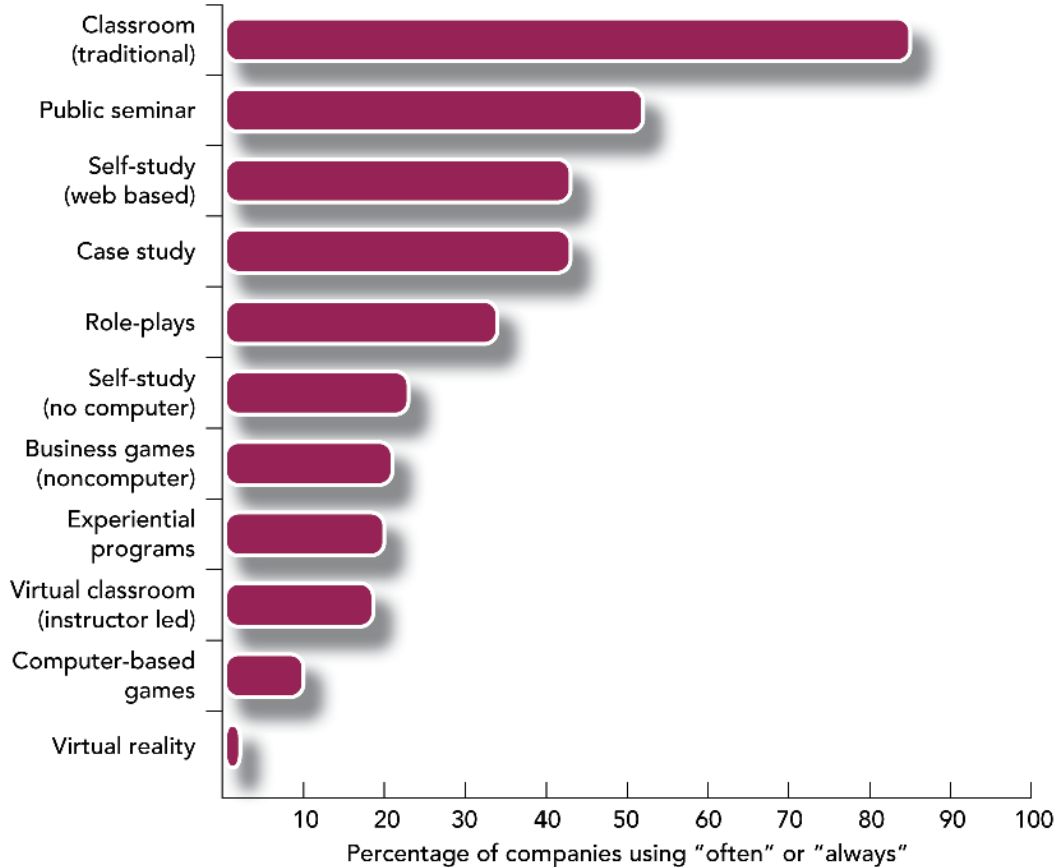
cussions, case studies, question-and-answer sessions, and role playing. Actively involving trainees enhances learning.

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.

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 over phone and computer lines. Through audio- and videoconferencing, they can hear and see lectures and participate in discussions. Computers can enable participants to share documents as well. FileNeT Corporation uses distance learning to help its sales force keep up with new software products. The salespeople disliked the company's early efforts to get them to read about new products on the Web; instead of enrolling for these online self-study courses, they flooded the company with requests for one-on-one assistance. The company had more success with Webcasting, providing classroom instruction through live broadcasts, allowing them to submit questions. As FileNeT has replaced some of its classroom training with

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Webcasting, it has saved $500,000 a year.[13] 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 that trainees attend a class. Trainees can also work independently, using course material prepared on audiotapes and videotapes or in workbooks. Audiovisual techniques such as overhead transparencies, slides, and videos can also supplement classroom instruction.

Training with videotapes has been used for improving communications skills, interviewing skills, and customer service skills. Videotapes can also be effective for demonstrating how to follow procedures, such as welding methods. Morse-Brothers provides training to the drivers of its ready-mix trucks with a series of videos. A mentor-driver selects a weekly video, schedules viewing sessions, keeps attendance records, and guides a wrap-up discussion. The short (10 minutes or less) videos cover topics such as safe driving, avoidance of excessive idling, and observing product tests at job sites. The mentor-drivers are trained in leading the discussion that follows the video, including how to call attention to key learning points and relate the topics to issues the drivers encounter on the job.[14]

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. Videotapes and video clips on CD-ROM 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. 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.[15] Finally, it is easier to customize computer-based training for individual learners.

The Shoney's and Captain D's restaurant chains must train more than 8,000 employees each year on the basics of operating the business, including how to make

french fries, hush puppies, and coleslaw, while managers need training in business issues and back-office operations. The biggest challenge was how to train employees spread over 20 states. Shoney's solution was called OneTouch, which allows users to send and receive video, voice, data, and live Web pages, so that team members can interact with trainers. The OneTouch system is available on desktop PCs positioned anywhere in the restaurant, as well as on computers stationed in warehouses and at repair bays. The training sessions cover topics related to new-employee orientation, kitchen operations, and dining room services. Each module introduces topics and follows up with quizzes. For example, one kitchen program shows trainees what the coleslaw ingredients are and where they are located in the restaurant. Trainees watch a video and practice along with it. After practicing, they take a quiz, and the manager verifies that they have completed the topic. The training is consistent, easy to update, and enables employees to learn each other's skills.[16]

Electronic Performance Support Systems

Computers can support trainees in applying training content to their jobs. *Electronic performance support systems (EPSSs)* are computer applications that provide access to skills training, information, and expert advice when a problem occurs on the job.[17] An EPSS gives trainees an electronic information source that they can refer to as they try applying new skills on the job. For example, Atlanta-based poultry processor Cagle's uses an EPSS for employees who maintain the chicken-processing machines.[18] The makers of machines that measure and cut chickens are continually improving this equipment, so that companies have no practical way to train technicians in the equipment's details. Instead, companies train technicians in the basic procedures for maintaining the machinery. When a problem occurs, the technicians combine the basic training with the EPSS to obtain enough information to fix the problem. On the EPSS, the technicians can look up detailed instructions for repairs, check parts availability, and find replacement parts in inventory.

E-Learning

Receiving training via the Internet or the organization's intranet is called **e-learning** or online learning. E-learning may bring together Web-based training, distance learning, virtual classrooms, and the use of CD-ROMs. Course content is presented with a combination of text, video, graphics, and sound. E-learning has three important characteristics. First, it involves electronic networks that enable the delivery, sharing, and updating of information and instruction. Second, e-learning is delivered to the trainee via computers with Internet access. Finally, it goes beyond traditional training objectives to offer tools and information that will help trainees improve performance. The system also may handle course enrollment, testing and evaluation of participants, and monitoring of progress.

With e-learning, trainees have a great deal of control. They determine what they learn, how fast they progress through the program, how much time they practice, and when they learn. E-learners also may choose to collaborate or interact with other trainees and experts. They may use the training system's links to other learning resources such as reference materials, company Web sites, and other training programs. The "e-HRM" box describes how the advantages of e-learning have improved salesforce training at Cisco Systems.

Like other forms of computer-based learning, e-learning can reduce training costs and time. Trainees often appreciate the multimedia capabilities, which appeal to several

e-learning
Receiving training via the Internet or the organization's intranet.

E-HRM

CISCO SYSTEMS SOLD ON E-LEARNING

Cisco Systems of San Jose, California, is a leading company that develops networking systems for the Internet. But after growth throughout the 1990s, Cisco fell on hard times during the 2001 economic downturn, and the company had to lay off more than 4,000 employees. Still, Cisco did not cut back on its commitment to employee learning. Chief executive John Chambers believed training in the form of e-learning would help Cisco recover from its economic woes and create stronger ties with information technology.

A team consisting of the company's Internet Learning Solutions Group, the Information Technology Unit, and Chambers developed the Cisco Media Network. They collaborated to ensure a match between the company's tools and technology, its business purpose, and effective learning principles. The Cisco Media Network is a large, private broadcasting network linked via satellite to a worldwide grid of computer servers. The network serves about 1,000 users. The content comes from the company's business units, technology groups, and product marketing groups. The network broadcasts include the company's annual meeting, video briefings by executives, and learning portals for employees and customers.

The Media Network has been useful for developing e-learning for Cisco's account managers, who are the company's front-line sales force. To determine the account managers' needs, Cisco carried out a needs assessment that included interviews with them to identify what they needed to learn and how much time they had available for learning. Many of the account managers said learning content was not being delivered to them in a way that fit their work patterns or learning styles. Account managers spend a lot of time traveling, so they wanted to get on the Internet, find out what they needed to know, and get out again. They preferred not to sit in front of a personal computer for a long e-learning course.

Responding to these preferences, Cisco began offering the Account Manager Learning Environment (AMLE). The AMLE is based on four business objectives: increase sales, shrink time from closing a deal to receiving revenue, lower time required for account managers to become competent in a topic, and reduce travel and costs.

The learning goals for the AMLE also include creating a learning environment that motivates account managers to use it. To achieve these objectives, the AMLE consists of a suite of learning tools—everything from small chunks of information and short skill-building sessions, to a simulator that presents various scenarios of sales calls to give account managers practice in handling difficult questions that come up in real-world situations. In the simulator, the questions arrive through a realistic audio feed. The account manager selects a response, and the program delivers immediate and specific feedback for improvement.

Account managers using the AMLE can choose remote access or download lessons to the hard drive of their computer. While traveling, they can access a "talk show" and save it to their laptop or to an MP3 player. The talk show discusses issues related to their work. In addition, Cisco offers a magazine with fast facts and advice.

SOURCE: Based on M. Delahoussaye and R. Zemke, "Ten Things We Know for Sure about On-Line Learning," *Training*, September 2001, pp. 48–59; and P. Galagan, "Delta Force," *T&D*, July 2002, pp. 21–28.

senses, and the opportunity to actively participate in learning and apply it to situations on the job. 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

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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. Under state and federal guidelines, apprenticeship programs must require at least 144 hours of classroom instruction plus 2,000 hours (one year) of on-the-job experience.[19] Some apprenticeship programs are sponsored by individual companies, others by employee unions. As shown in the left column of Table 7.3, 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. Will-Burt Corporation of Orrville, Ohio, started an apprenticeship program for machinists and brake press set-up operators. Each session combines classroom studies with hours of on-the-job training. After they have completed their apprentice training, employees who want to become journeymen must take additional training in classes taught on-site through a partnership between Will-Burt and Wayne College, University of Akron.[20]

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, in Cedar Rapids, Iowa, Kirkwood Community College participates in an organization called Workplace Learning Connection, which finds students internships at hundreds of local companies.[21] High school students who pass a screening by the Workplace Learning Connection participate in semester-long internships. Many interns hope the internship will not only teach them about a workplace but also lead to a job offer. Brian Whitlatch interned at the Iowa 80 Truck Stop, where he helped mechanics work on trucks. He worked without pay as an intern, but he received course credit and, three weeks before graduation, a job offer. Many internships prepare students for professions such as those listed in the right column of Table 7.3.

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.

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

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

TABLE 7.3
Typical Jobs for Apprentices and Interns

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 employees' level of basic skills.[22]

The OJT program at Borden's North American Pasta Division has many of these characteristics.[23] Borden's carefully selects, trains, and rewards the managers and peers who act as trainers. The train-the-trainer course involves classroom training as well as time on the manufacturing floor to learn how to operate machinery such as pasta machines and correctly teach other employees how to use the equipment. Trainees in the OJT program complete a checklist in which they verify that the trainer helped them learn the skills needed and used effective teaching techniques.

Simulations

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.

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 to teaching production and process skills as well as management and interpersonal skills. Time Warner cable installers learn how to correctly install cable and high-speed Internet connections by crawling into two-story houses that have been built inside the company's training center. Trainees drill through the walls and crawl around inside these simulated houses, learning how to work in different types of homes.[24]

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 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.

virtual reality

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

A recent development in simulations is the use of virtual reality technology. **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.[25] 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 is a feature of the simulated environment of the advanced manufacturing courses in Motorola's Pager Robotic Assembly facility. Employees wear a head-mounted display that lets them view a virtual world of lab space, robots, tools, and the assembly operation. The trainees hear the sounds of using the real equipment. The equipment responds as if trainees were actually using it in the factory.[26]

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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, legendary motorcycle maker Harley-Davidson uses a business game to help prospective dealers understand how dealerships make money. The game involves 15 to 35 people working in teams. Each of the five rounds of the game challenges teams to manage a Harley dealership and compete against each other. In each round, the teams face a different business situation—new products, a change in interest rates, or a crisis such as a fire at the business. Between rounds, participants attend lectures and discuss case studies that teach the concepts reinforced by the game.[27] 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.[28] 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 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 videotape 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 videotape 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.[29] 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."[30]

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.

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.

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. California-based Quantum Corporation used experiential learning to build the teamwork it needed to carry out a project to overhaul the company's infrastructure. The project would bring together employees who were not used to working with each other. They came from the company's information technology, engineering, marketing, and graphic design departments and worked in locations dispersed across several countries. In the experiential training, a group of actors led the team through a series of improvisational activities designed to get the team members to share personal stories. The actors interpreted those stories, and sometimes team members played the parts. Following this training, the team members reported greater understanding of one another, a condition that later helped the team meet deadlines and complete projects.[31]

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

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).

Does adventure learning work? The impact of these programs has not been rigorously tested, but participants report they gained a greater understanding of themselves and the ways they interact with their coworkers. 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.

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

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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

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.[32] 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 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.

For both kinds of team training, the training program usually brings together several training methods. To teach communication skills, training could begin with a lecture about communicating, followed by an opportunity for team members to role-play scenarios related to communication on the team. Boeing combined a number of methods in a team training program designed to improve the effectiveness of the 250 teams designing the Boeing 777.[33] Teams include members from a variety of specialties, from design engineers to marketing professionals. These team members had to understand how the process or product they were designing would fit with the rest of the finished jet. Boeing's training started with an extensive orientation emphasizing how team members were supposed to work together. Then the teams received their work assignments. Trainers helped the teams work through problems as needed, with assistance in communication skills, conflict resolution, and leadership.

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.[34] Typically, 6 to 30 employees participate in action learning; sometimes the participants include customers and vendors.

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.

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.

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For instance, a group might include a customer that buys the product involved in the problem to be solved. Another arrangement is to bring together employees from various functions affected by the problem. ATC, a public transportation services management company in Illinois, used action learning to help boost profitability by reducing operating costs. Employees were divided into Action Workout Teams to identify ways of reducing costs and to brainstorm effective solutions. The process assumed that employees closest to where the work gets done have the best ideas about how to solve problems. Teams of five to seven employees met once a week for a couple of hours for up to two months. The teams studied problems and issues such as overtime, preventive maintenance, absenteeism, parts inventory, and inefficient safety-inspection procedures. The teams assigned priorities to their ideas, developed action plans, tried their ideas, and measured the outcomes, eventually saving the company more than $1.8 million.[35]

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.

✎ 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.[36] Table 7.4 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.[37] 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.[38] For complex tasks, it may be

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.
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 7.4

Ways That Training Helps Employees Learn

SOURCE: Adapted from R. M. Gagne, "Learning Processes and Instruction," *Training Research Journal* 1 (1995/96), pp. 17–28.

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.[39] 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 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.[40] 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.

readability
The difficulty level of written materials.

HR HOW TO

GETTING EMPLOYEES INVOLVED IN LEARNING

Employees will get the most out of training that is well designed to get them involved in learning. Generating interest is especially important in today's work environment, where most employees feel pressed for time. They need to know that the training program will help them achieve their objectives. Whether online or in person, the goal for the organization is to create an effective learning environment.

The obvious starting point is to make sure the learning site is comfortable and any needed equipment is working. Trainers also need to ensure that any materials have been distributed to employees. The content of the training must also be relevant to the people being

trained, so it is important to talk to employees during the planning phase. Trainers need to know what employees think about the topic, or they may later find themselves fighting to sell its relevance. Trainer Dennis Stevenson makes a point of visiting job sites to gather information. He walks around and asks people about the problems they're facing. Then, says Stevenson, "When I go back [later] and tell them what the benefits of the training are going to be, I can tie those to the problem they told me about, rather than something I invent." Training course enrollment should be easy for employees, and their records should be kept up to date.

Relevance also includes the elements of timing and practice. Training programs should be offered at a time in employees' careers when they can really use the information. They should also be allowed to practice new skills and obtain immediate feedback through on-the-job observation, tests, and quizzes.

Training will seem most relevant in an organization that clearly values and rewards learning. Supervisors should model this behavior by participating in opportunities to learn. Supervisors who interact directly with their employees during training can provide specific feedback for improvement and praise. They can also demonstrate a correct behavior or skill.

- 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.

Another approach is to substitute videotapes, hands-on learning, or other non-written 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.

The "HR How To" box provides further ideas for implementing training in a way that motivates employees and enables them to learn.

✎ 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 7.5 on page 234—trainee satisfaction with

The organization might also offer rewards for completing educational programs—including prestige, not just money. Southern California Water Company offers a 40-hour Train-the-Trainer Program in which employees learn how to teach what they have learned. These employees conduct most of the company's training, bringing their firsthand experience to the subject matter.

People often want training to be fun, and the right kind of fun can in fact enhance learning. But the entertaining elements of the training should not be merely silly; that kind of fun is distracting. Instead, the trainer should look for ways to engage the trainees in the course's content.

That's what Stevenson did when he was conducting training for dockworkers at an organization that was having trouble with sexual harassment. Female workers had been filing and winning lawsuits, and the company decided it needed to conduct sensitivity training. Stevenson realized that most dockworkers would not be enthusiastic about being asked to learn "sensitivity." Instead, he opened the program by introducing himself and pulling out a mousetrap. He invited participants to stick their finger in the trap. When no one volunteered, Stevenson showed how to spring the trap without injury, letting a few volunteers try his method. Then Stevenson pulled out a rat trap and again asked for volunteers. Again, no one stepped forward, although they enjoyed watching the trap smash pencils. Finally, to everyone's entertainment, he brought out a man-sized trap, 30 by 48 inches. Throughout this demonstration, Stevenson brought home his main point: Some "traps" hurt a little but are bearable, while others are dangerous and can break a person. This method engaged his audience and opened them up to thinking about more constructive ways to work with female employees.

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 7.5—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:

transfer of training
On-the-job use of knowledge, skills, and behaviors learned in training.

figure 7.5

Measures of Training Success

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.[41] 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.

Noe–Hollenbeck–Gerhart–Wright:
**Fundamentals of Human
Resource Management,
Second Edition**

**II. Acquiring and Preparing
Human Resources**

7. Training Employees

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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, then to 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. 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 Walgreens, evaluation of training for pharmacy technicians convinced the company that formal training was economically beneficial. The drugstore chain developed a training course as an alternative to on-the-job training from pharmacists. Some of the newly hired technicians participated in the test of the program, taking part in 20 hours of classroom training and 20 hours of supervision on the job. Other technicians relied on the old method of being informally trained by the pharmacists who had hired them. After the training had ended, pharmacists who supervised the technicians completed surveys about the technicians' performance. The surveys indicated that formally trained technicians were more efficient and wasted less of the pharmacists' time. Also, sales in pharmacies with formally trained technicians exceeded sales in pharmacies with technicians trained on the job by an average of $9,500 each year.[42]

◈ APPLICATIONS OF TRAINING

Two categories of training 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.[43] 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 7.5 summarizes the content of a typical orientation program. Such a program provides information about the overall

LO8
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.

TABLE 7.5

Content of a Typical Orientation Program

Company-level information
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

Department-level information
Department functions and philosophy
Job duties and responsibilities
Policies, procedures, rules, and regulations
Performance expectations
Tour of department
Introduction to department employees

Miscellaneous
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.

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.

Orientation at National City Corporation, a bank and financial services company based in Cleveland, includes several courses. The Early Success program offers new hires a comfortable environment, support network, and series of classes about products and customer service. The program includes an overview of National City's corporate objectives, employee benefits, and information about the brand. Another course, called People, Policies, and Practices, covers the material in the employee handbook. Top-Notch Customer Care focuses on how to provide service and work in teams. Each new employee is matched with a peer (called a *buddy*) who is available to answer the new employee's questions. Since National City launched its orientation program, its employees are far less likely to quit within the first three months on the job, an improvement that has saved the company about $1.35 million a year.[44]

At The Container Store, orientation is about more than job skills.[45] The company also wants employees to care about what they are doing and to be committed to the organization. New employees at The Container Store participate in a one-week training program called Foundation Week. During the first day of Foundation Week, employees learn the company's philosophy, and they spend most of the day with the store manager. On the following days, they learn about the way merchandise is arranged in the stores, various selling techniques, roles of employees in different positions, and ways to provide customer service. Only after completing the entire week of training do employees receive the apron they wear while at work. The manager presents the

apron during a ceremony intended to encourage the new hires. According to Barbara Anderson, The Container Store's director of community services and staff development, "The psychological effect of having to wait for that apron is incredible." Anderson says that since the company started its Foundation Week program, newly hired employees are more self-confident and productive, and they tend to stay with the company longer.

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 training may have some or all of the following goals:

- Employees should understand how their values and stereotypes influence their behavior toward others of different gender and ethnic, racial, and religious backgrounds.
- Employees should gain an appreciation of cultural differences among themselves.
- Employees should avoid and correct behaviors that isolate and intimidate minority group members.

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?

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

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 videotapes 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 is that they may actually reinforce stereotypes by focusing on differences rather than similarities among coworkers.[46] But it is generally held that greater awareness has a positive effect.

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 groups to discuss specific promotion opportunities or management practices that they believe were handled unfairly. Another approach is to teach managers and employees basic rules of behavior in the workplace.[47] 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. For example, the United Parcel Service (UPS) Community Internship Program is designed to help UPS senior managers understand the needs of diverse customers and a diverse workforce through exposure to poverty and inequality. In projects that typically last four weeks, managers travel to cities throughout the United States, where they work on problems facing local populations. They may serve meals to the homeless, work in AIDS centers, help migrant farm workers, build temporary housing and schools, and manage children in a Head Start program. UPS managers report that the program helps them look for unconventional solutions to problems. One manager, after being impressed by the creative and practical ideas that addicts in a halfway house suggested for keeping teens away from drugs, realized she needed to capitalize more on the creativity of the employees she supervised. When she returned to her job, she began involving her full staff more in problem solving.[48]

Although many organizations have used diversity training, few have provided programs lasting more than a day, and few have researched their long-term effectiveness.[49] 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.[50] 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 be well structured, connected to the organization's rewards for performance, and include a way to measure the success of the training.

thinking ETHICALLY

Can You Teach People to Be Ethical?

This chapter looked at training as a way to ensure that employees have a variety of skills and abilities, such as knowing how to perform the tasks involved in a particular trade and being able to work constructively with a diverse group of people. Some organizations also provide training to help their employees make ethical decisions.

Molson Coors Brewing Company offers its employees several resources related to ethics, including interactive e-learning, ethics leadership training, and a visual "map" to guide ethical decision making. These training resources support detailed ethics policies and supplement a company help line to call for guidance in specific situations. According to Warren Malmquist, who developed the ethics training for Adolph Coors Company before its 2005 acquisition of Molson, "The goal of the program is to step beyond rules and guidelines and teach employees how to think, clarify, and analyze situations." The e-learning program presents scenarios and provides feedback to help employees see the ethical principles related to their decisions. The program includes a series of modules presented as an "expedition" from a base camp to the top of the mountain. As the employee ascends through the modules, the topics become more complex and the choices less obvious. All new hires must complete this course within 90 days, and existing employees must take refresher courses.

SOURCE: Based on Samuel Greengard, "Golden Values," *Workforce Management,* March 2005, pp. 52–53.

Questions

1. To make ethical decisions, what skills and abilities do you need? What else do you need besides skills and abilities?
2. Do you think the ethics training described here will help make Molson Coors employees more ethical? Explain.
3. Suppose you became responsible for providing ethics training at Molson Coors. What additional ideas from the chapter or your own experience would you want to apply to the program described here?

SUMMARY

1. 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.

2. 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.

3. 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.

4. 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.

5. 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 first-hand 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.

6. 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.

7. 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.

8. 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 effec- tive if it is tied to business objectives, has management support, emphasizes behaviors and skills, and is well structured with a way to measure success.

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 weak-

nesses 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 troubleshooting 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?
9. Who should be involved in orientation of new employees? Why would it not be appropriate to provide employee orientation purely online?
10. Why do organizations provide diversity training? What kinds of goals are most suitable for such training?

WHAT'S YOUR HR IQ?

The text Web site offers two more ways to check what you've learned so far. Use the Self-Assessment exercise to evaluate your own training needs. Go online with the Web Exercise to see a demo of an online learning course.

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BusinessWeek CASE

BusinessWeek The Learning Environment at United Technologies

Even to his closest friends, George David of United Technologies Corporation (UTC) comes off as a study in contrasts. He will speak passionately about the problem of the country's growing income gap between rich and poor before a crowd of factory workers at UTC's Carrier air-conditioner plant in Collierville, Tennessee—though he himself took home a pay packet worth $70 million last year. Before anyone can write off their leader as heartless, David's eyes tear up while recalling Yuzuru Ito, the late quality guru who helped him formulate his guiding principles of leadership.

Getting a handle on George David isn't easy. An ardent student of both history and management, he has the air of an academic and talks like some modern-day Plato in a production plant. But David, 62, is more than a head-in-the-clouds theorist. He has transformed his old-line industrial conglomerate into a $31 billion powerhouse of productivity with relentless attention to detail. He has taken commodity products such as elevators and air conditioners and, thanks to a constant innovation and superior technology, turned them into high-margin businesses that dominate worldwide. And while he can terminate thousands of workers at a stroke in the name of efficiency, he also has crafted one of the most progressive employee education programs in the world—even extending benefits to laid-off workers.

Together, these disparate impulses have yielded big results. In David's decade at the helm, this philosopher king of manufacturing has more than quadrupled earnings per share and outperformed even the mythic General Electric Company in returns to investors (stock price performance). Profitability measures, too, have improved significantly.

David has racked up these results despite his penchant for controversial investments that don't directly benefit the bottom line, at least not within any normal time horizon. His Employee Scholar Program costs $60 million a year, and workers don't even have to tie their studies to the job. Anything goes, from medieval poetry to medical training, with UTC picking up the tab. David also likes to move early to fund new technologies, such as fuel cells. David believes these initiatives are the seed corn that will grow into businesses that can sustain the company long after he has left office. UTC spends more than $2.5 billion a year on research and development, spawning more than 350 patents a year.

When asked how much new technology has contributed to the productivity revolution at UTC, David puts his thumb and index finger together in a circle and says "zero." He adds that technology has been critical to product innovation and improved communication, but most gains in the plant come from better processes, not better machines.

As business ebbs and flows, it's workers who often pay a dreadful price. David is achingly blunt about the need for employees to control their destinies in everything from health care to job security. But perhaps more than any other leader in Corporate America today, he is also deeply committed to giving them the tools to do this. His Employee Scholar Program gives workers up to three paid hours off a week to study and pays up front for the entire cost of books, tuition, and fees for any education program—except, perhaps, the kind found on matchbook covers or pricey pilot training. The program covers every employee, from the elevator technician in Zimbabwe to the office assistant in Tyler, Texas, with some education benefits even extending to laid-off workers. And, for each degree earned, employees get up to $10,000 in UTC stock or stock options.

That commitment has helped a relatively low-profile company draw some of the best in business. What's more, once workers bag the degree and take home the stock, they tend to stay. Retention among employee scholars is about 20 percent higher than for regular U.S. workers. Lance Bartosz, a 30-year-old engineering manager, joined the company after learning about the program from a friend. So far, he has completed an MBA and is now getting a master's degree in engineering. "This has made me feel a stronger allegiance to UTC."

One of David's first tasks as president was to persuade a retiree named Yuzuru Ito to work on improving the productivity of UTC's businesses. David first encountered Ito in 1989, after he was brought in by the unit's Japanese joint venture partner, Matsushita Industrial, to figure out why Otis's fancy new Elevonic 401 elevators were such clunkers. Their callback rates—the number of times per year a building owner has to call mechanics for service—were as high as 40 per unit a year, versus an average of 0.5 for rival Mitsubishi Electric. Under Ito, engineers analyzed the cause of the problem, and the work they did changed the fundamental design of the elevator line worldwide.

David leaned on Ito, first as a consultant and then as a full-time adviser, to make the techniques he used to analyze the elevators adaptable and accessible to every person in the plant. The program evolved and became known as ACE, or Achieving Competitive Excellence. "ACE pilots" are production line workers who learn the quality process in a matter of days. They learn to pinpoint problems ranging from fundamental design flaws to a coworker's fatigue from staying up with a newborn all night. One recent result: more logical placement of elevator parts that trims $300 off the cost of each elevator.

David extended the teachings all the way down through the organization. In 1998, he launched an "Ito University"

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where anyone—not just a bunch of bright young management wannabes—can analyze and share UTC case studies in quality. Lecturers are as likely to be accomplished production line workers as ambitious execs. ACE bulletin boards, documenting every inch of accomplishment on a particular site, became staples in UTC plants.

SOURCE: Excerpted from Diane Brady, "The Unsung CEO," *BusinessWeek*, November 1, 2004, downloaded from Infotrac at http://web5.infotrac.galegroup.com.

Questions

1. Briefly summarize the training methods used by United Technologies Corporation. What corporate goals do these methods seem intended to support?
2. What are the advantages of offering tuition reimbursement to all employees, rather than targeting training to particular job-related skills? What are the disadvantages?
3. What are the advantages of opening Ito University to all employees? What are the disadvantages?

CASE: Learning Is Business at Nokia

Nokia Corporation, the world leader in mobile communications, has over 50,000 employees and net sales of $30 billion. Nokia consists of two business groups: Nokia Networks and Nokia Mobile Phones. The company also includes the separate Nokia Ventures Organization and a corporate research unit, Nokia Research Center. Nokia's goal is to strengthen the company's position as the leading communications and systems provider by offering personalized communication technology and entering new business segments that the company predicts will experience fast growth. As the demand for wireless access to services increases, Nokia plans to lead the development and commercialization of networks and systems required to make wireless content more accessible and rewarding for customers.

The management approach at Nokia, known as the "Nokia way," consists of the Nokia values, its organizational competencies, and its operations and processes used to maintain efficiency. The company has built its current and future strength on the Nokia way. The company has a flat, decentralized structure, and it emphasizes networking, speed, and flexibility in decision making. Nokia's values include customer satisfaction, respect for the individual, achievement, and continuous learning.

Continuous learning provides employees with the opportunity to develop themselves and to stay technologically current. Employees are encouraged to share experiences, take risks, and learn together. Continuous learning goes beyond formal training classes. At Nokia, continuous learning means employees support each other's growth, developing and improving relationships by exchanging and developing ideas. The company uses e-learning to give employees the freedom to choose the best possible time and place for personal development.

Nokia's top management is committed to continuous learning. The business group presidents are "owners" of all global management and leadership programs for senior managers. They provide input into the development of these programs and appoint "godfathers" from their management teams to participate throughout each program and design the program's content. Together with the training and development staff, the godfathers help the learning processes. Most of the programs involve active learning in the form of strategic projects the participants must complete. Top managers review the projects and have authority to take action based on recommendations from the project team.

The value Nokia places on continuous learning translates into opportunities for personal and professional growth. Employees are encouraged to create their own development plan and use available learning methods. Highly skilled employees serve as coaches to help other employees develop and share ideas with one another. Nokia employees have access to a wide variety of training and development opportunities including learning centers and the Learning Marketplace Internet, which has information on all the available learning opportunities such as e-learning and classroom courses. These programs bring together employees from all of Nokia's business groups. Nokia believes that this creates knowledge as employees share their different traditions and experiences.

In addition to formal programs, Nokia emphasizes on-the-job learning through job rotation and challenging work assignments. Managers also have a wide range of opportunities to improve their management and leadership skills. Some of these result from the performance management process, during which employees and their managers set goals and review performance.

Nokia emphasizes that learning should result in improved operations and better business results. So, the company uses a combination of measures to evaluate the results of training. After employees have completed a program, Nokia asks them for their immediate reactions. Other measures include whether the employees have attained the expected level of competence. Nokia's top managers believe that the main benefits of its learning programs are the sharing of knowledge, the reinforcement of continuous learning, and the commitment of employees to the company.

SOURCE: Based on the Nokia Corporation Web site, www.nokia.com, August 22, 2003; and L. Masalin, "Nokia Leads Change through Continuous Learning," *Academy of Management Learning and Education* 2 (2003), pp. 68–72.

Questions

1. Nokia's commitment to continuous learning emphasizes a belief that the organization benefits when employees share their knowledge with each other. Which of the training methods and ideas in this chapter would contribute to this kind of knowledge sharing?

2. How might the company's training department promote the sharing of knowledge?

3. Is there a difference between support for learning (which Nokia expresses) and support for training? Explain.

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