

**LEARNING
EXECUTIVE
THINK TANK**

LEARNING EXECUTIVE THINK TANK INSIGHTS

Top 4 Ways to Get Closer to Your Training Consumers



INTRODUCTION

“Today’s business climate necessitates a proactive learning community that ingests core business objectives...that immediately impact the bottom line.”

The word “change” has become yet another irrefutable reality in our lives (along with death and taxes). It seems the business climate is in a never-ending state of flux, with reports of “major players” folding and relative up-starts sky-rocketing to the top tier seemingly overnight. And so, in this climate of “change,” the challenge for every learning executive is to recognize the “changing” wants and needs of their customers and fulfill them while remaining profitable.

Learning executives are working in the eye of this storm. Businesses are fighting for profits, market share, customer retention, and for some, their very existence. This battle necessitates a proactive learning community that ingests core business objectives, works side-by-side with key executives, and creates training initiatives that immediately impact the bottom line and productivity.

In our fourth Learning Executive Think Tank, Tom Clancy, VP of Education at EMC, and Tom Kelly, former learning executive at Cisco, NetApp, and Oracle, met with a handful of top learning leaders to discuss the messages and approaches they’re using to establish closer relationships with their clients and core audiences.

The panel included learning executives from diverse businesses including global business consulting services, manufacturing, health care, financial services, philanthropy, and knowledge services.

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To these leaders, we asked the following question:

What are you doing differently than what you have done in the past to get closer to your audiences and the consumers of your training product?

Our roundtable participants agreed that change is a constant factor in their business. And, one of the most significant shifts occurring in the training industry is the change in focus from *training* to *performance*. In order to be successful, the learning leader must take on a business-partner mentality and assume the role of performance consultant instead of learning leader.

The current shift is to approach learning from a “macro” level in determining positive results. This means focusing on behavior and its impact on the organization. One of our panelists equated this to social marketing—education and information sharing that results in changed behaviors.

“Addressing training from a social marketing perspective will necessitate knowledge transfer, and then a series of reinforcements, reminders, refreshers, penalties and bonuses until the desired behavior is achieved.”

Our panel indicated that tracking the number of people who completed training is not as meaningful to the enterprise as it once was. What matters are the results on a broad scale that can be attributed directly to training. For example, one of our participants from a major communications company noted a 68 percent increase in sales among those representatives who completed a 13-week, comprehensive training curriculum specifically designed to achieve this objective. This was way more

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applicable than which sales individuals sold more or less. Furthermore, divisions within the organization that completed this training experienced average revenue that was 387 percent higher than those who did not complete the curriculum.

To have a desired effect on the business, performance must be improved in one or more of three areas:

- Top Line Revenue (not Training Revenue)
- Productivity of employees, partners, customers
- Customer satisfaction

To know what your clients need and how best to deliver a useful end product, you have to get close—get inside their organization to begin to see their challenges from their perspective as a colleague—become a member of their team working toward the same goals.

KEY FINDINGS

“To satisfy performance objectives you need to develop strong, close relationships with customers to accurately determine wants versus needs.”

Our learning leader panel shared some of the approaches they’re using to get closer to their clients, determine the clients’ needs and build effective training programs that succeed. We uncovered these top four takeaways.

#1: Determine True Training Needs

Training requests are not the same as training needs.

The dynamics of business today require that change be addressed quickly and effectively. This is often achieved through training. However, the role of the learning department has shifted from devising compulsory training programs to meet particular skill sets to advising clients on how to meet specific performance objectives. This is further complicated if the client is ambivalent about what they want versus what they truly need.

To satisfy performance objectives, you need to dig deep to uncover *true* learning needs. In many instances, customers don’t know what to ask for; they’re just looking for particular results. An innovative approach involves developing strong, close relationships with customers to accurately determine wants versus needs. It’s a matter of managing clients’ expectations.

It’s common for clients to request training to address a perceived deficiency. As a performance consultant, it’s important to uncover the real need, and then decide if it is a training issue and if it requires a training solution. If the problem can be solved through training, only then can you create a curriculum to address that requirement. One roundtable participant from a major investment company shared:

“Communication is key in managing education. You can’t put someone in an assertiveness training session and expect immediate change. It’s incumbent upon us to manage our client’s expectations. We need to inform our client what a particular program will achieve and what it will not. It’s important to identify

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what restraining forces are present that prevent desired behaviors and what enabling forces are in play to produce desired behavior. My clients have been pushing for sales training. While sales training was part of the solution, what they *really* needed was a consistent process, tools and a common language to produce results.”

#2. Drive Relationships with Customers

Solid relationships result in better outcomes, more satisfied customers, and higher productivity.

Driving relationships means immersing yourself into your customer’s business—working side-by-side with your customer to get a better understanding of the dynamics of their operation.

All of our panelists agreed that relationships are critical in the creation and implementation of meaningful training programs. When you entrench yourself in your learners’ business, you understand their challenges, instill trust, and establish yourself as a trusted advisor.

One participant, who represents a data management services company, stressed that clients need to be able to view you as an active participant in helping achieve their goals—rather than an outsider who’s imposing training on their team. Learning advisors become an extension of the team.

To immerse yourself in their business you can:

Place training staff inside business units.

One of our roundtable participants has physically placed training staff inside business units to give them a better understanding of their customers’ day-to-day operations. Another panelist brings in trainers who have a background in the division or business being served. The idea is that these trainers will better understand the dynamics of the business unit and their unique language.

“Develop a business-partner mentality to become an extension of your customer’s team and make training fit their demands and time constraints.”

“One of the things I’ve incorporated for everyone on my staff, including myself, is to spend 25 percent of our time in our client’s business. This allows us to better understand their jobs. I then make sure our training is accountable to that.”

Understand what they REALLY want/need.

One of our panelists, from a major software company, is trying to get closer to her audience through a wants and needs analysis.

“The survey helps to keep us on task and answers: ‘are we doing what they want?’ It validates our ideas and provides insightful feedback on what we should and shouldn’t do. We’re using this analysis to ensure we’re doing what the customer wants us to do and that it sufficiently drives revenue.”

Create learning report cards.

Another roundtable participant, from a major financial institution, works on relationship building through learning report cards.

“We went back to basics to find out what our customers’ goals really are. As a result, we had a major shift from classroom to online training. We aligned metrics and reporting to show what our contributions really are and distilled the difference between ‘want’ and the real ‘need.’”

Develop a business-partner mentality.

Our panelists underscore the importance of the learning department focusing on what is vital to the business. This means developing a business-partner mentality to become an extension of your customer’s team. As a meaningful business partner, you need to be hypersensitive to your customer’s time demands and strive to make training fit their time constraints.

One panelist from a financial services company noted that their greatest obstacle in training is getting their sales representatives to take training. If they are not selling they are not earning, so they are resistant to formal training. To counter this, she has started utilizing other opportunities, such as human resource

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activities, to slip in training information and content. This enables the sales force to gain new skills and insights without losing additional time on the front lines.

#3. Build Training Around Macro-Business Metrics

If training is not directly linked to performance goals and outcomes it will be viewed as a drain on time and money.

Training has no meaning unless it produces desired outcomes. Likewise, desired outcomes cannot be achieved if they are not recognized in the design of a training program.

Viewing training from the macro-level requires that you track trends and not individual results. Far too many variables exist in regards to the performance of any one individual success or failure. However, accurate comparisons can be made when comparing results of larger groups and can help identify correlations between training and successful outcomes.

Macro-business metrics are key to outcomes because they are directly tied back to the business unit or company goals. These metrics can be formulated by working your way backwards and developing training based upon meeting these goals. One of our discussion participants from a leading computer manufacturer calls this “reverse engineering training.”

“We focus on working with business leaders to understand what metrics are important to them and then devise training that will make them more successful. We let the customer set the metric and then make the metrics more meaningful to the customer.”

Another panelist developed self-service metrics that are easy for customers to access and understand. The idea is that business unit customers should be able to access training results at any time and that these results should translate into identifiable benefits directly related to that business unit.

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#4. Develop a Community of Power Users

In order to get the quantity and quality of feedback you desire, you need to develop more training champions.

Champions can come in the form of individual “power users” or “councils.” Essentially, they are trusted groups or individuals learning executives can rely upon for valid feedback regarding training requirements and constructive criticism.

One participant, from a major financial institution, employs power users to validate their initiatives.

“We utilize learning strategies to help determine if certain business challenges are really a training issue. We work with select users to determine the right approach. Our ‘power users’ help make sure the transfer of knowledge is really happening.”

Power users can also consist of an education council, an informal group of your best customers, or a certification program that registers and prequalifies your power users. By training your power users first, you can analyze the effectiveness of training initiatives before implementing them on a wider scale. This is how you determine what your customers really want and need, and whether or not you are giving them what they want.

CONCLUSION

“Change continues to be a constant in business, thus, learning executives must be adaptable in how they devise and deliver training.”

As change continues to be a constant in business, learning executives must be adaptable in how they devise and deliver training. You must immerse yourself in the organization and develop a business mentality to better understand the wants and needs of your customers.

Relationship-building is key in establishing trust and credibility. Metrics must be formulated with business goals in mind. A macro-business approach means that the metrics are easily accessed, relevant, and are easy to understand.

Finally, having power users in place ensures you get valid feedback on initiatives so that you can fine tune training before roll out.

This white paper is one of six roundtable discussions planned for 2009. To find the latest results from each roundtable discussion, visit <http://www.trainingefficiency.com/>

This roundtable discussion was sponsored by Expertus www.expertus.com, a learning services firm with over 500 learning specialists who help companies like Cisco, ADP and Lockheed Martin optimize every aspect of their learning organizations.

Roundtable Hosts



Tom Clancy

Tom Clancy is Vice President of Education Services and Productivity for EMC Corporation. In his career at EMC, Tom has held various field and corporate roles, primarily in partner management of Original Equipment Manufactures, Independent Software Vendors and Channels. Prior to Education Services, Tom managed Global Sales Productivity, focusing on field development, best practices and change execution. Since 2002, his chief responsibility has been to re-align training initiatives to meet the requirements of EMC's business model transformation from a hardware product company to a technology-led provider of systems, software and services. Under Tom's direction, EMC has transitioned from traditional ILT to a much more blended JIT and situational learning approach for specialization and consulting.



Tom Kelly

Tom Kelly has more than 25 years of experience in the education and training industry and has held positions at NetApp, Cisco, Oracle Corporation, Sun Microsystems, NeXT Corporation and Control Data Corporation. Tom is currently a trusted advisor for a growing list of clients, including small to mid-sized companies focusing on learning organizations systems and strategies.