

Strategic Planning for Training & Development

-Strategic Alignment of Learning Systems-

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Can be reached currently at:

EPPIC Inc.
www.eppic.biz

SWI

Since 1978

Aligning

Human

Talent

and

Energy

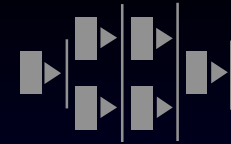


**Strategic Planning for Training &
Development**
-Strategic Alignment of Learning Systems-

Original version presented at the
1996 ISPI Conference
April 18, 1996

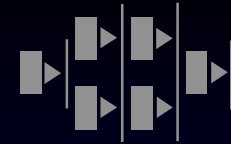
Guy W. Wallace, SWI Partner

Foreword to the Presentation



- **The topic covered in this presentation is inherently complex**
 - **Businesses have unique challenges and opportunities, and the systems to address those are never simple**
- **SWI has developed a rigorous, but flexible process to deal with this complexity**
- **Addressing this complexity will allow you to**
 - **Understand the totality of your business, its challenges, and its human asset development needs**
 - **Translate your understanding into T&D issues**
 - **Create a T&D system strategically aligned with the priority needs of the business**

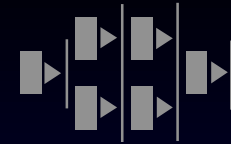
About SWI



- Since 1978, SWI has partnered with clients to improve return on investment (ROI) and economic value added (EVA) and achieve their strategic intent through the application of Human Performance Technology
- SWI's focus is on processes and systems for Human Asset Management, specifically
 - Organizational Architecture
 - Staffing
 - T&D
 - Assessment
 - Rewards & Recognition
- SWI works primarily with Fortune 100 companies

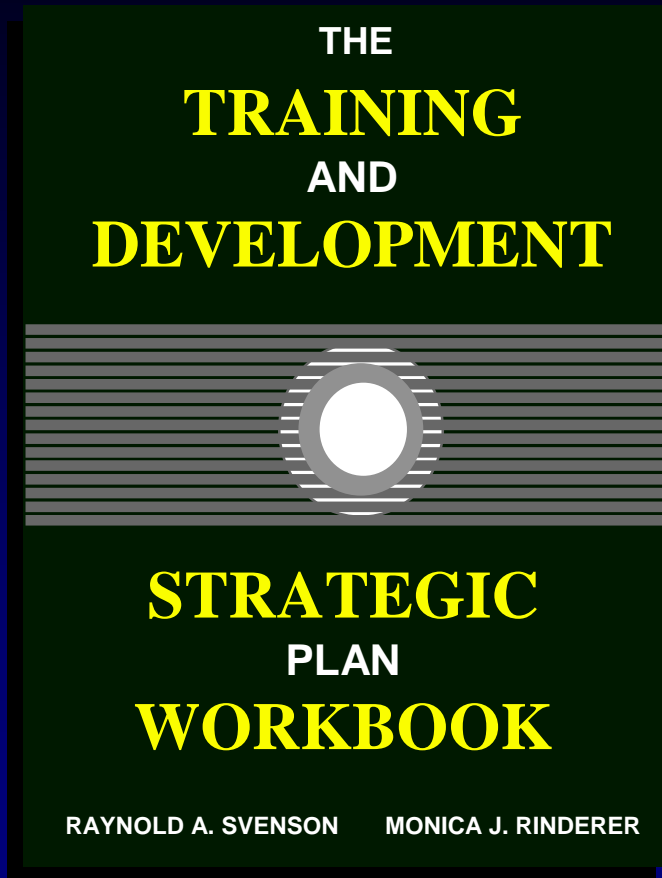
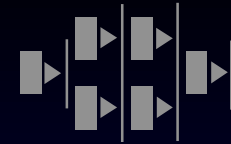
Aligning Human Talent and Energy

Guy Wallace

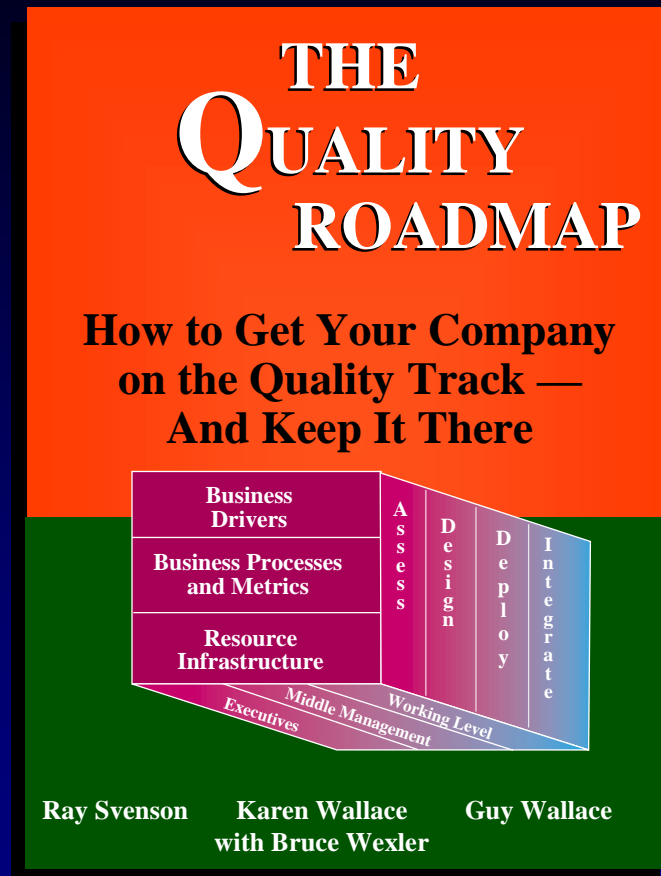


- **Partner in SWI since 1982**
- **Former training project supervisor with MTEC—forerunner to Motorola University, course developer at Wickes Lumber, and journalist for U.S. Navy**
- **Applies Total Quality Management, Human Performance Technology, Instructional Technology, and project planning and management principles to T&D efforts**
- **Expertise in Human Performance Analysis and Curriculum Architecture Design and Development**

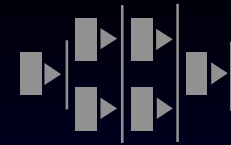
SWI Books



WINNER!
**ISPI Award for Outstanding
Instructional
Communication**

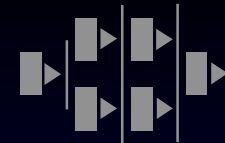


Strategic Planning for Training & Development Projects



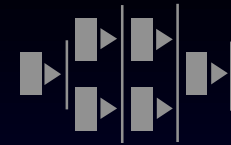
- **Abbott Laboratories** 1993
- **ALCOA** 1984, 1985, 1986, 1991
- **Allstate Insurance** 1991, 1992
- **Amoco** 1992, 1993
- **AT&T** 1981, 1984, 1986, 1987, 1988, 1991, 1992
- **Bandag, Inc.** 1995
- **Baxter Healthcare** 1983, 1986
- **CCH, Inc.** 1993
- **Commonwealth Edison** 1981, 1983
- **Contel** 1989
- **Data General Corporation** 1993
- **Digital Equipment Corporation** 1987, 1992
- **Discover Card Services, Inc.** 1992
- **Dow Chemical** 1986
- **E. I. Du Pont** 1991
- **Eli Lilly and Company** 1996
- **Exxon** 1981, 1982
- **Ford Design Institute** 1993
- **General Dynamics** 1990
- **General Motors Corporation** 1984, 1986, 1990
- **GPU Nuclear** 1986
- **Hoechst Celanese Corporation** 1992

Strategic Planning for Training & Development Projects (continued)



• Illinois Bell	1986, 1987, 1988
• Intel	1990
• International Harvester	1980
• Johnson & Johnson	1988
• Maryland State Department of Education	1990
• Mobil	1990
• NASA	1993
• NCR	1990
• Northern Telecom	1983, 1984
• Northern Trust Bank	1987
• Novacor Chemical, Ltd.	1993, 1994
• Occidental Chemical	1989
• Pacific Telephone & Telegraph	1978
• Salt River Project	1988
• Shell Oil	1982
• Square D	1990
• Tenneco	1983
• Texaco Canada	1988
• The World Bank	1992
• United Airlines	1995
• Westinghouse	1982
• Whirlpool	1986

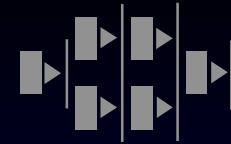
Session Objectives



After this session, you will be able to

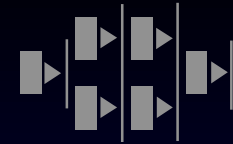
- **Assess your current T&D system against the characteristics of a world-class system**
- **Determine whether or not a Strategic Plan for Training & Development would have value in your organization**
- **Plan a Strategic Plan for Training & Development project**
- **Position or sell a Strategic Plan for Training & Development project to senior management**

Session Agenda



- 1. Session open**
- 2. The business need and rationale for Strategic Planning for Training & Development**
- 3. T&D system assessment handout**
- 4. SWI's business and T&D systems models**
- 5. SWI's four-phase Strategic Planning for Training & Development process**
- 6. Planning a Strategic Planning for Training & Development project**
- 7. Selling a Strategic Planning for Training & Development project**
- 8. Session summary**

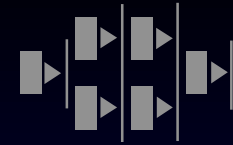
Section 2



The Business Need and Rationale for Strategic Planning for Training & Development

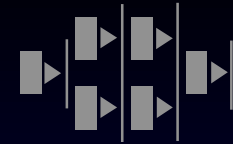
- SPT&D -

T&D . . . *A Means to an End*



High-
performing
Organization

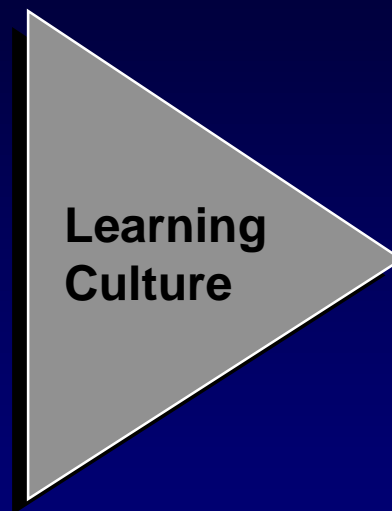
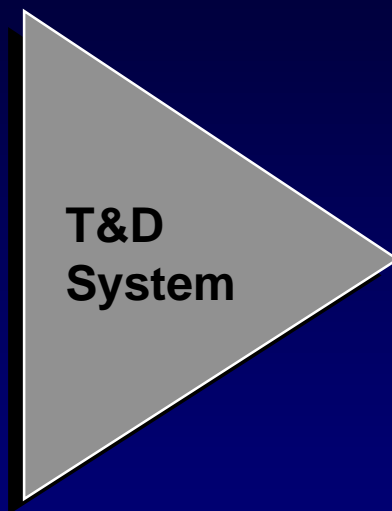
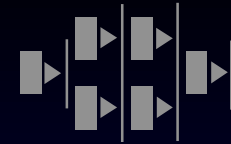
T&D . . . *A Means to an End*



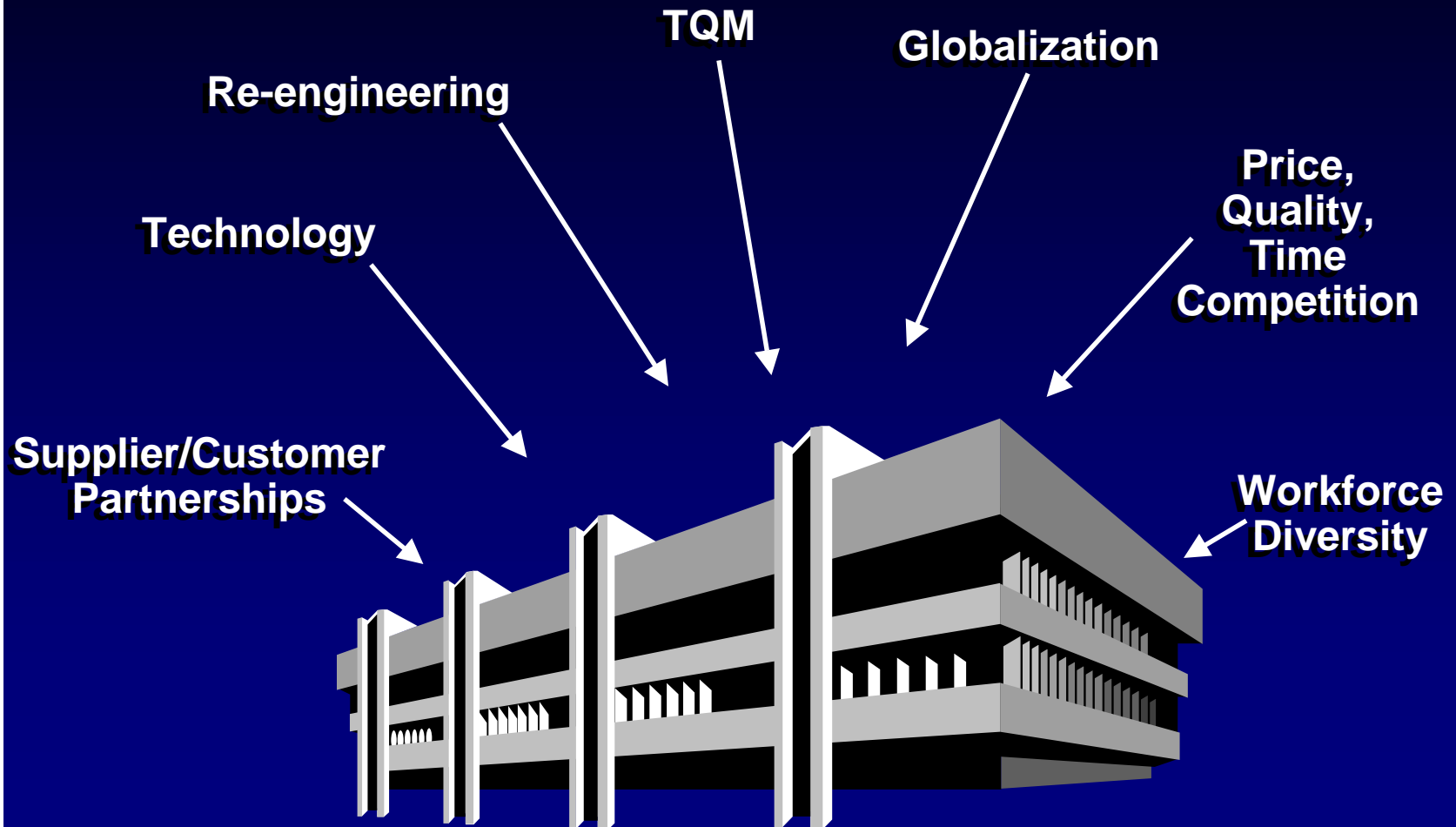
**Learning
Culture**

**High-
performing
Organization**

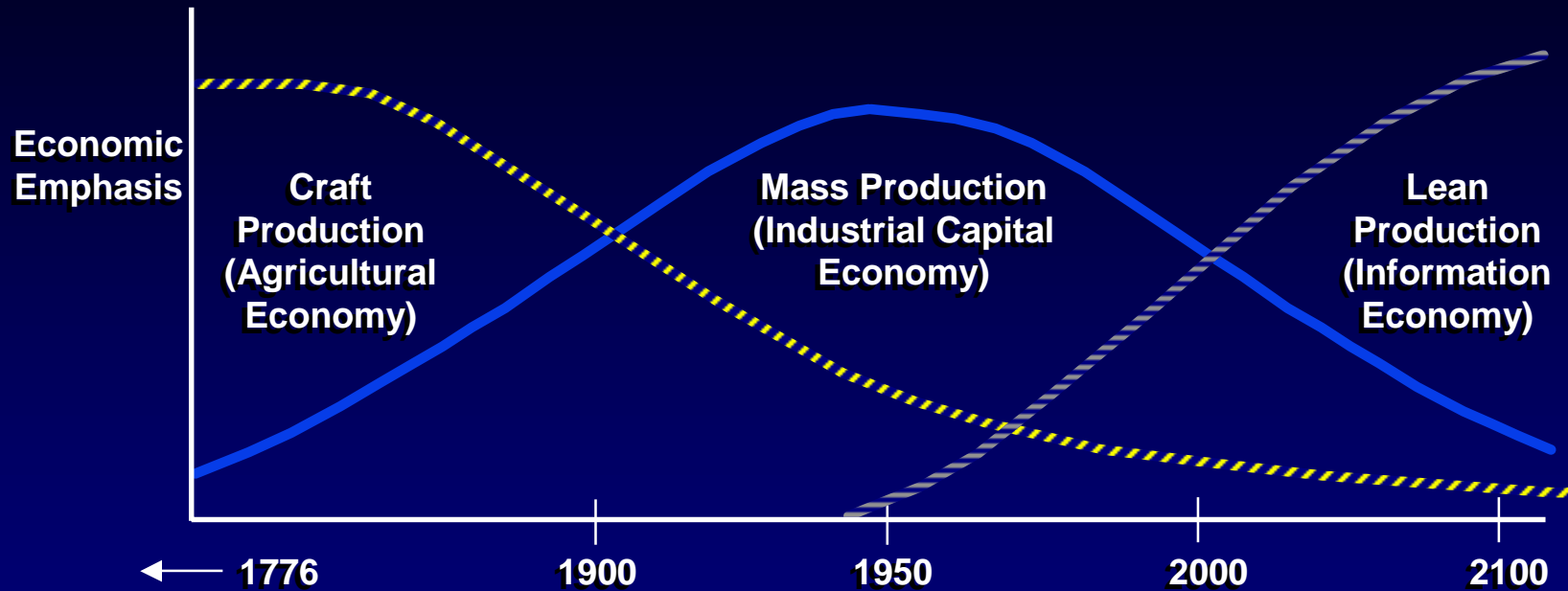
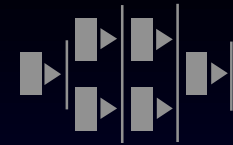
T&D . . . *A Means to an End*



Changing Forces in the Business Environment



Major Paradigm Shift

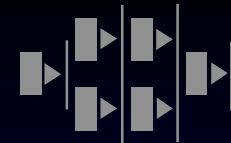


 Craft Production (Agricultural Economy)

 Mass Production (Industrial Capital Economy)

 Lean Production (Information Economy)

Some Common Themes in the New Paradigm



Teams and teamwork

Quantitative decision-making

The learning organization

Elimination of waste

Process control

Customer focus

Delaying

1/2 the time
1/10 the defects
2/3 the cost

Central service groups

Bureaucracy busting

Cycle-time reduction

Empowerment

Information technology

Continuous improvement

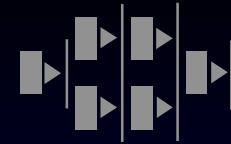
Networked organizations

Supply-chain partnerships

Disappearance of standard jobs

Decentralizing decisions

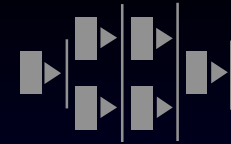
Workforce Implications



- **Disappearance of unskilled work**
- **All workers become problem solvers**
- **Decomartmentalization of professionals and managers**
- **Constantly changing role assignments**
- **Redefinition of management**

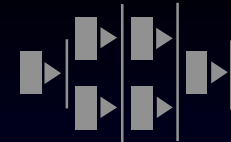
***New skills**
***Continuous learning**

T&D Implications



- **Peak performance requires full skills development**
- **Multidimensional change multiplies the new skills to be learned**
- **Management of the skills inventory (human assets) becomes an executive priority**
- **T&D are managed as an investment**
- **Training response times must be much shorter**
- **Training must be more customized to individual and team needs and local conditions**
- **Training can take advantage of the different tools and technologies emerging in the new business environment**
- **Learning becomes a part of everyday work versus training as a single event**
- **Trainers often replaced by on-the-job coaches**

The Shifting Organizational Learning Culture

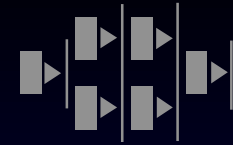


Traditional Learning Culture

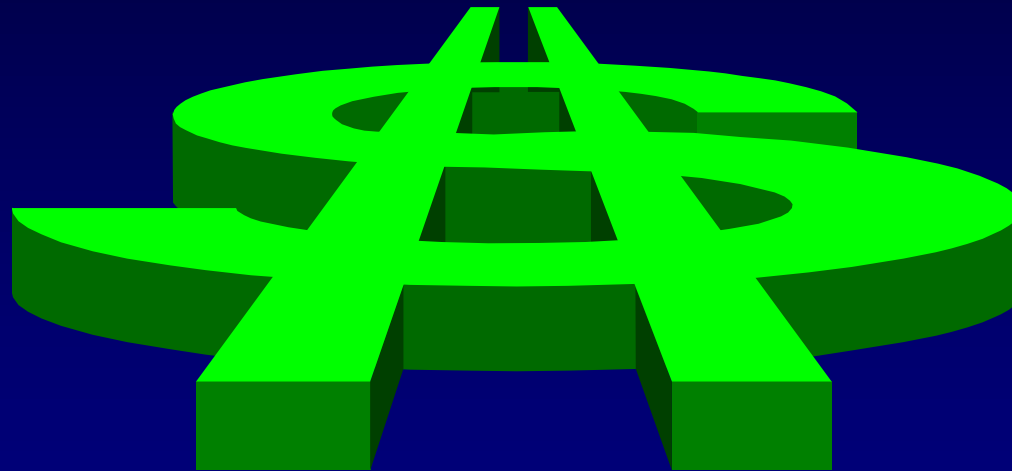
- **No clear focus on strategic knowledge**
- **Low management priority for training and education**
- **Lack of linkage between learning and organizational goals**
- **Unmanaged**
- **Left to the training department and the individual**

Learning Culture for Today's Environment

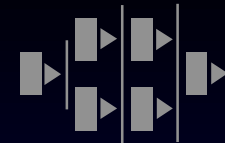
- **Competence (human assets) treated as the new capital and managed as such**
- **Training (learning) systematically focused to support business goals**
- **Everyone has an important role within the learning system**
- **Training department partners with managers and employees in making training decisions**



What is this worth to the business?



Financial Analysis of Training Opportunities



**Cost of
Conformance**

=

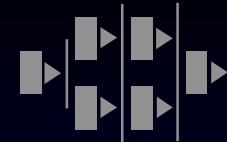
**All of the costs required to
train the workforce to a level
of competence and to define,
develop, and deliver the
needed training**

e.g.,

- Analysis
- Design
- Development
- Delivery
- Administration
- Travel/living
- Etc.

**By itself, the cost of conformance (COC) may be large
enough to scare off your executives**

Financial Analysis of Training Opportunities (continued)



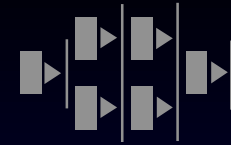
Cost of Nonconformance	=	All of the costs for less than perfect performance
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e.g.,

- Cost of underperforming technology/capital assets
- Cost of lost sales
- Low productivity/yields
- Longer work cycle times
- Rework and scrap due to errors
- Etc.

Relative to the cost of conformance (COC), the cost of nonconformance (CONC) is probably far greater and far more scary

The Return on Investment Calculation

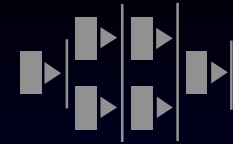


$$\mathbf{ROI} = \frac{\mathbf{Return - Investment}}{\mathbf{Investment}} = \frac{\mathbf{CONC - COC}}{\mathbf{COC}}$$

CONC = Cost of Nonconformance

COC = Cost of Conformance

Training's Impact on ROI

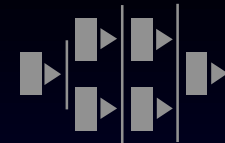


Situation

A major semiconductor manufacturer has an automated production process where unscheduled downtime is worth \$10,000/hour. Maintenance technicians have not received training on new process control computers. In the first six months, downtime has equaled 30 percent, of which one-quarter can be attributed to training.

Training's Impact on ROI

(continued)



Value

$$\begin{array}{r} \mathbf{30} \\ \% \text{ Downtime} \end{array} \times \begin{array}{r} \mathbf{80} \\ \text{Hours/week} \end{array} \times \begin{array}{r} \mathbf{24} \\ \text{Weeks} \end{array} = 576 \text{ hours of downtime}$$

$$\begin{array}{r} \mathbf{576} \\ \text{Hours} \end{array} \times \begin{array}{r} \mathbf{0.25} \\ \% \text{ Training} \end{array} \times \begin{array}{r} \mathbf{\$10,000} \\ \text{Downtime} \\ \text{Cost} \end{array} = \$1,440,000 \text{ value}$$

Cost

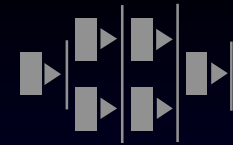
$$\begin{array}{r} \mathbf{\$150,000} \\ \text{Development} \end{array} + \begin{array}{r} \mathbf{\$150,000} \\ \text{Instructor} \\ \text{and Facilities} \end{array} + \begin{array}{r} \mathbf{\$40,000} \\ \text{Student} \end{array} = \$340,000$$

ROI

$$\frac{\mathbf{\$1,400,000 - \$340,000}}{\mathbf{\$340,000}} = \mathbf{312\%}$$

Training's Impact on ROI

(continued)

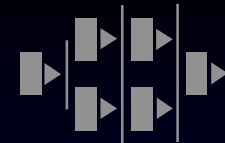


Situation

A telephone company has installed new workstations and software for 250 service representatives. Training was informal, and the measured productivity of the CSRs has reached only 50 percent of capacity after four months.

Training's Impact on ROI

(continued)



Value

$$\begin{array}{r} \$40,000 \\ \text{Loaded} \\ \text{annual} \\ \text{salary} \end{array} \times \begin{array}{r} 100\% \\ \text{\% of job} \\ \text{using the} \\ \text{workstation} \end{array} \times \begin{array}{r} 250 \\ \text{CSRs} \end{array} \times \begin{array}{r} 0.50 \\ \text{Productivity} \\ \text{\%} \end{array} = \$5 \text{ million annual} \\ \text{(plus irate customers,} \\ \text{overtime, etc.)}$$

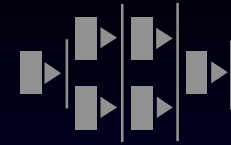
Cost

$$\begin{array}{r} \$300,000 \\ \text{Development} \end{array} + \begin{array}{r} \$140,000 \\ \text{Deliver 3 days to} \\ \text{250 CSRs} \end{array} = \$440,000 - \$0.5 \text{ million}$$

ROI

$$\frac{5 - 0.5}{0.5} = 9:1$$

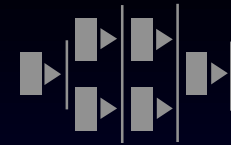
Section 3



T&D System Assessment

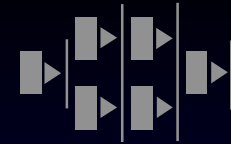
- plus handout -

Attributes of a World-Class T&D System



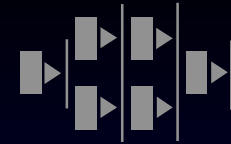
- 1. Organizational cultural values support full competency development and lifelong learning**
- 2. Everyone participates in the T&D system and processes**
- 3. The T&D system is driven by business performance goals and is performance-based**
- 4. There are tight linkages between T&D departments and the users of their services**
- 5. There is strong executive leadership and participation**
- 6. T&D resources are matched to need and objectives**
- 7. T&D staffs are competent and include a balanced mix of expertise**

Attributes of a World-Class T&D System (continued)



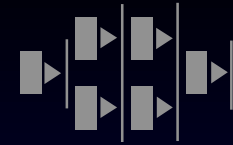
8. **A balanced array of T&D strategies is employed**
 - **Beyond traditional T&D deployment modes, including the use of advanced computer technologies**
 - **Internet and Intranet**
 - **Structured/coached OJT**
 - **Etc.**
9. **There is strong administrative coordination of all T&D efforts**
10. **Internal T&D resources are leveraged through appropriate use of outside resources**

Trends in T&D



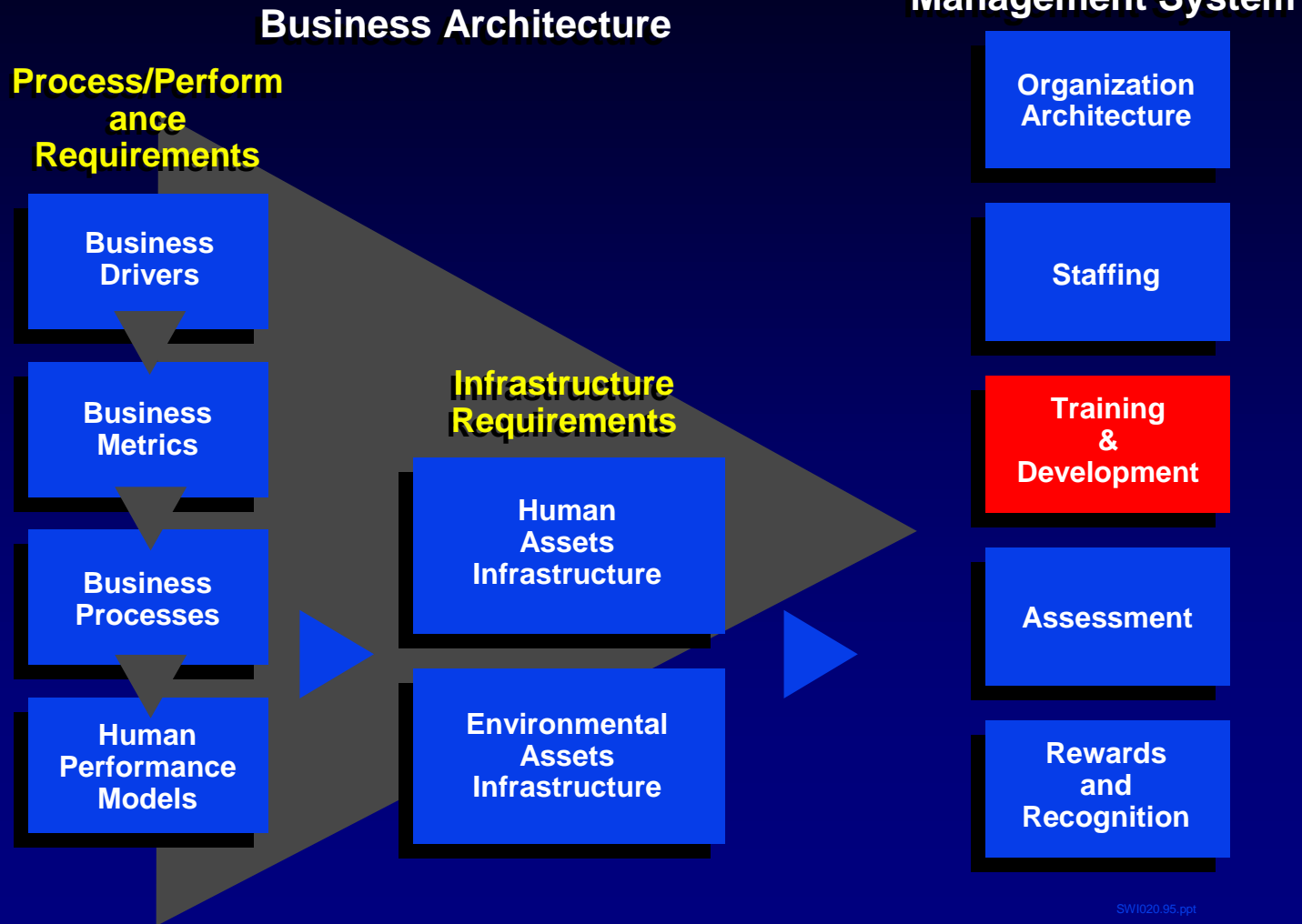
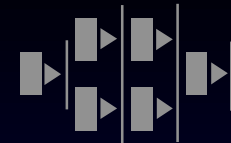
- **Decentralizing the learning site**
- **Action learning**
- **Using the information network and personal computer/workstation**
- **Embedded performance support systems**
- **Structured, on-the-job training (SOJT)**
- **Team learning**
- **Skills management interfaces**
- **Multimedia technology**
- **Distance learning**
- **Outsourcing**

Section 4



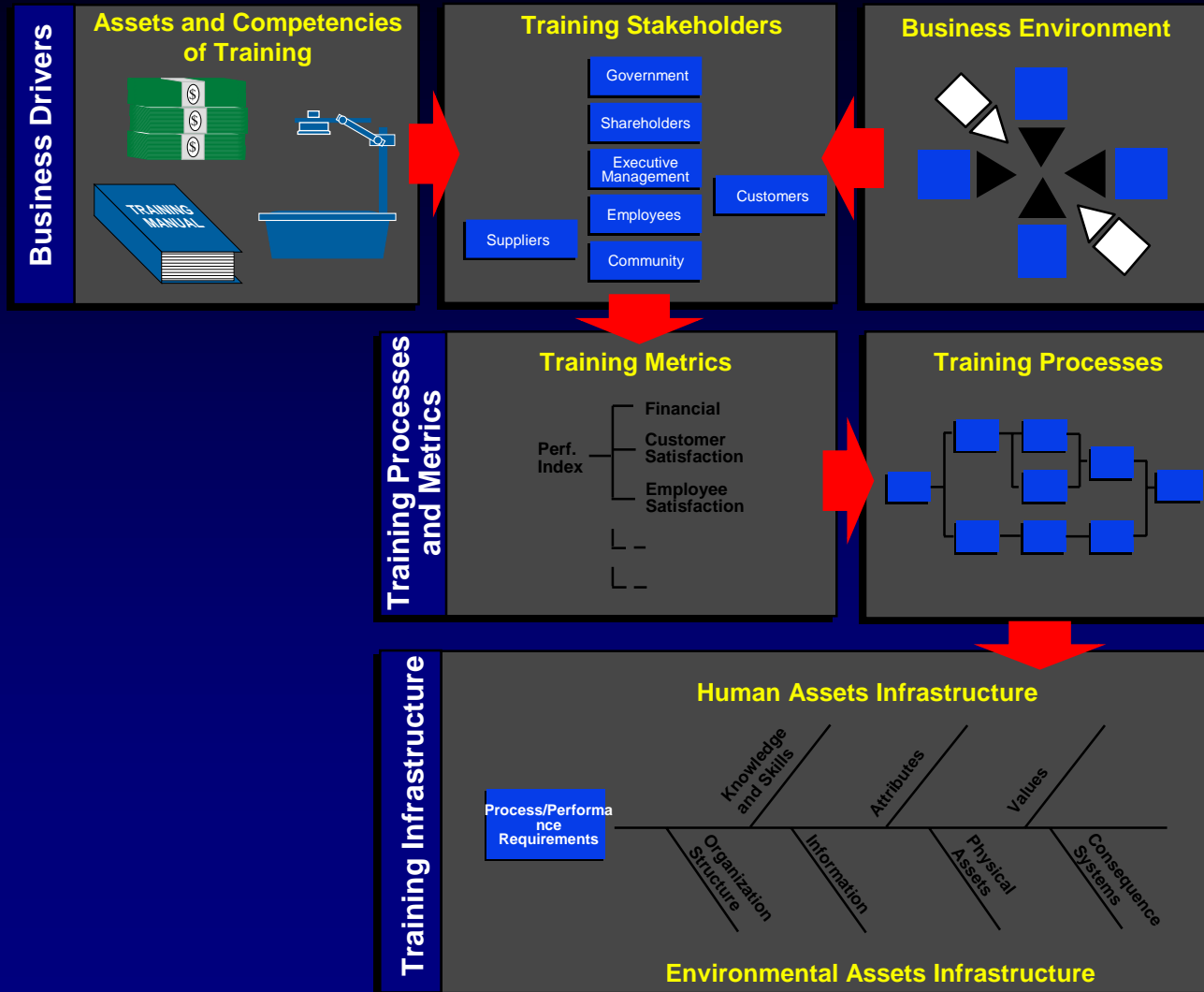
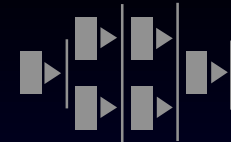
SWI's Business and T&D Systems Models

SWI's Business Model Context for T&D

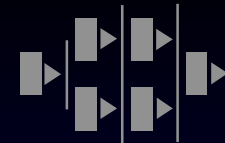


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The Business Architecture of T&D

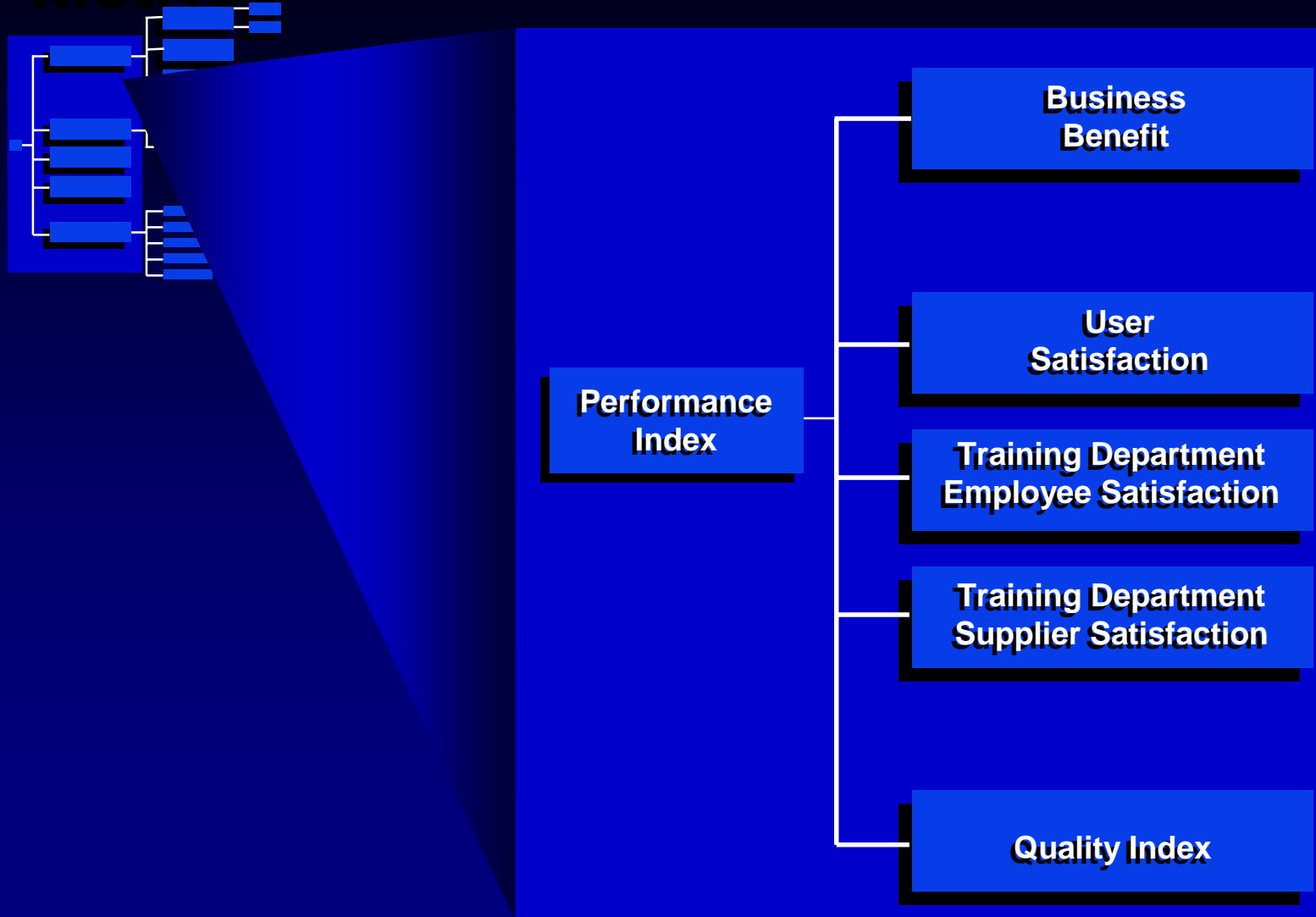
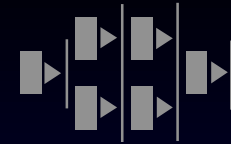


Example: T&D Business Drivers

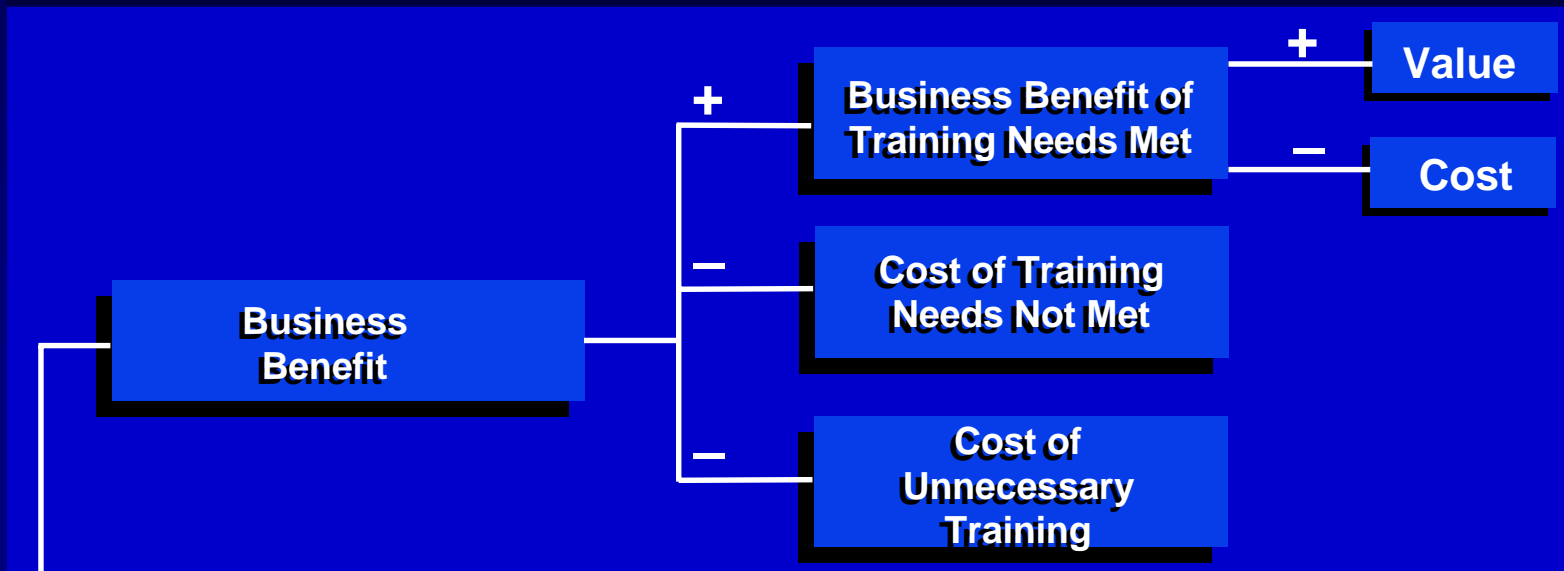
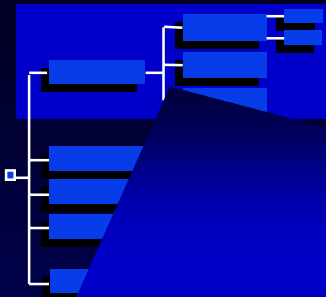
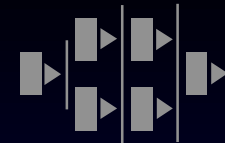


Assets and Competencies	Stakeholders	Business Environment
<p>Assets</p> <ul style="list-style-type: none"> • Available courseware • Production capability • Delivery infrastructure <ul style="list-style-type: none"> -Facilities -Networks (CBT and other) • Analysis data • Training staff <p>Competencies</p> <ul style="list-style-type: none"> • Front-end analysis of performance • Curriculum Architecture Design (CAD) • Instructional design/development • Just-in-time delivery • Developing customer solutions 	<ul style="list-style-type: none"> • Business leadership <ul style="list-style-type: none"> -General management -Process owners -Professional/technical discipline leaders -Initiative leaders • Employees (end consumers of training) • Customers of the company <ul style="list-style-type: none"> -Users of products and service who need training • Suppliers of the company <ul style="list-style-type: none"> -May need training on interfacing, TQM, etc. • Training department employees and suppliers 	<ul style="list-style-type: none"> • Rate of change impacting training customers • Rate of hiring and job movement • Competitive or alternative sources of training • Best practices • Customer/user perceptions about training • Technologies

Example: T&D Performance Metrics



Example T&D Performance Metrics (continued)



T&D Processes



Leadership

Planning and Budgeting

- Strategic planning
- Operational planning
 - Workload
 - Staffing strategy
- Budgeting

Overall System Design/Improvement

- Job/team design/redesign
- Process design/redesign
- Process support materials

Results Measurement

- Financial results
- Customer satisfaction
- Employee satisfaction
- Training results

Operations Management

- Work management
- Program coordinator
- External linkages
- Internal linkages

Core Process

Needs/Performance Analysis

- Preliminary Analysis Report
- Analysis Report

Curriculum Architecture Design

- Curriculum Analysis Report
- Curriculum Design Document
- Implementation Planning Report

Design, Develop, Procure

- Course Design Document
- Instructional Materials
- Instructor Training Plan
- Pilot results

Delivery

- Delivery plan
- Trained employees

Evaluation

- Evaluation design
- Evaluation documents
- Evaluation reports

Maintenance

- Maintenance plan
- Courses updated

Project Management

- Project Plan
- Team organization
- Project status reports
- Final project report

Support

Training Technology Surveillance

Training Administration

- Environmental resource management
- Registration and scheduling
- Training materials inventory
- Training attendance tracking

Staffing

- Recruiting and selection
- Training and development
- Performance management
- Career management

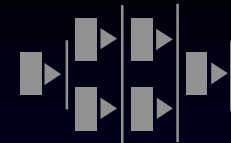
Training Information Management

- Information system in place

Training Marketing and Communication

- Training marketing tools

T&D Infrastructure Requirements



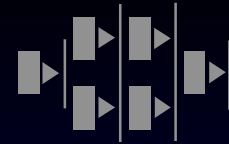
Human Assets Infrastructure

Analysis	Subject Matter Expertise	Measurement Expertise
Design	Desktop Publishing	Planning
Development	Graphics	Marketing and Sales
Instruction	Technology Expertise	Finance/Accounting
Facilitation	Project Management	Administration

Environmental Assets Infrastructure

Organization and Team Structure	Training Facilities and Equipment	Analysis Data
Client Boards/Councils	Materials and Materials System	User Data
Budget/Financial Resources	Communications Networks	Results Data
Suppliers	Tools/Workstations	Financial Data
	Information Systems	

Example Infrastructure Elements



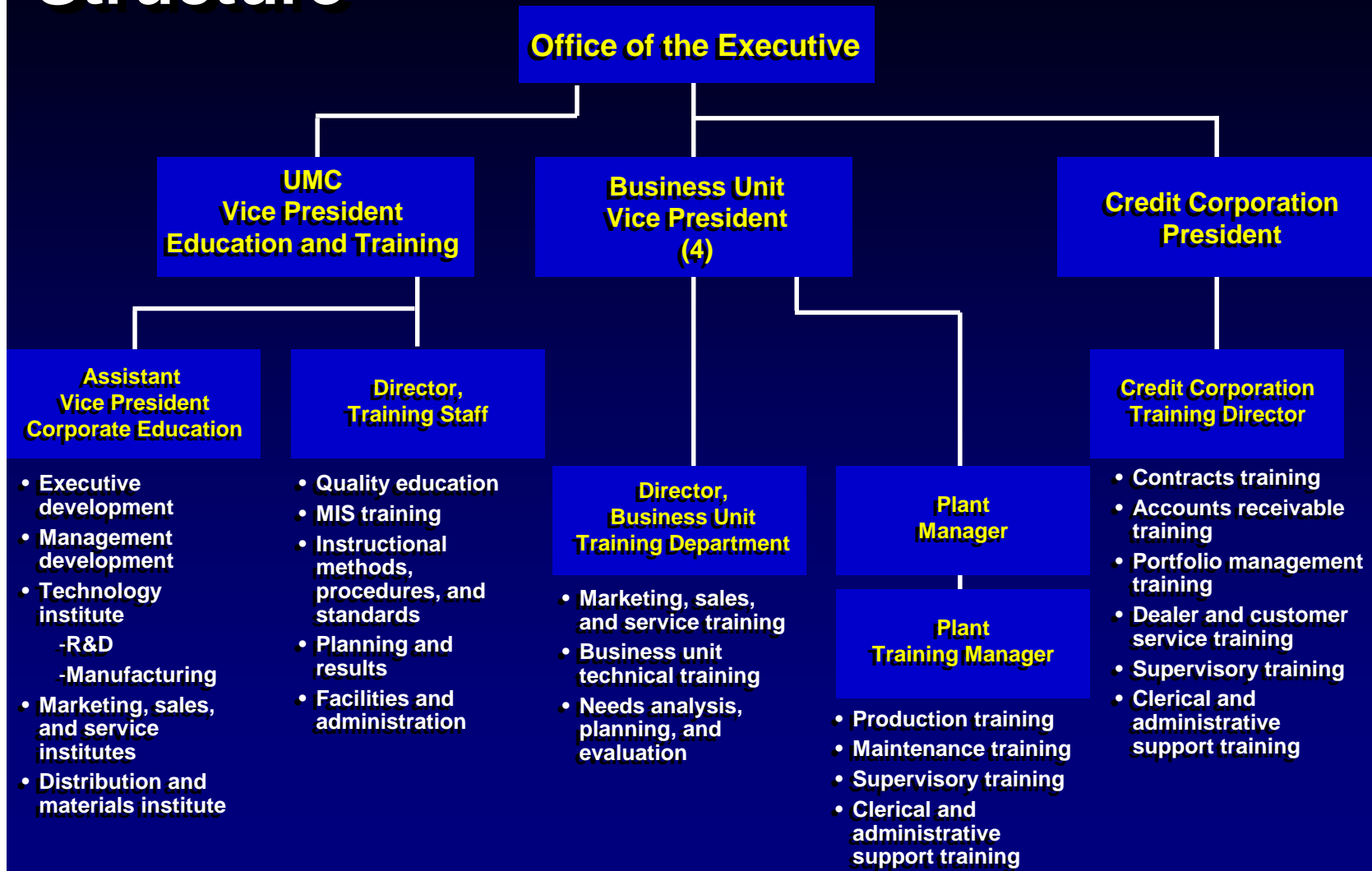
**Training
Organization
Structure**

**Governing
Structure**

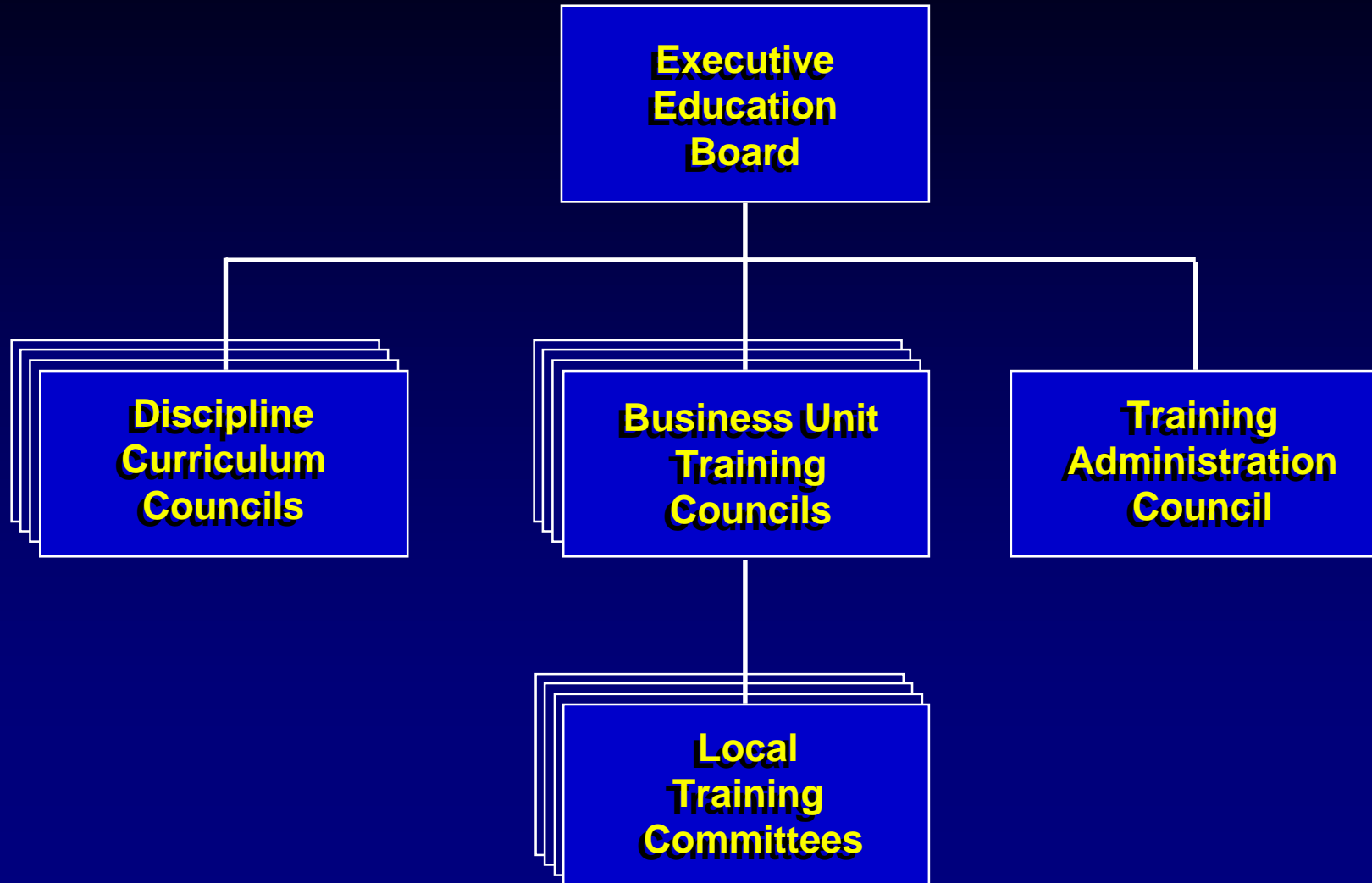
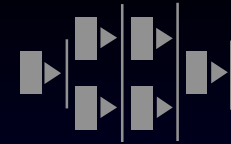
**Workplace
Learning
System**

**Delivery
Systems**

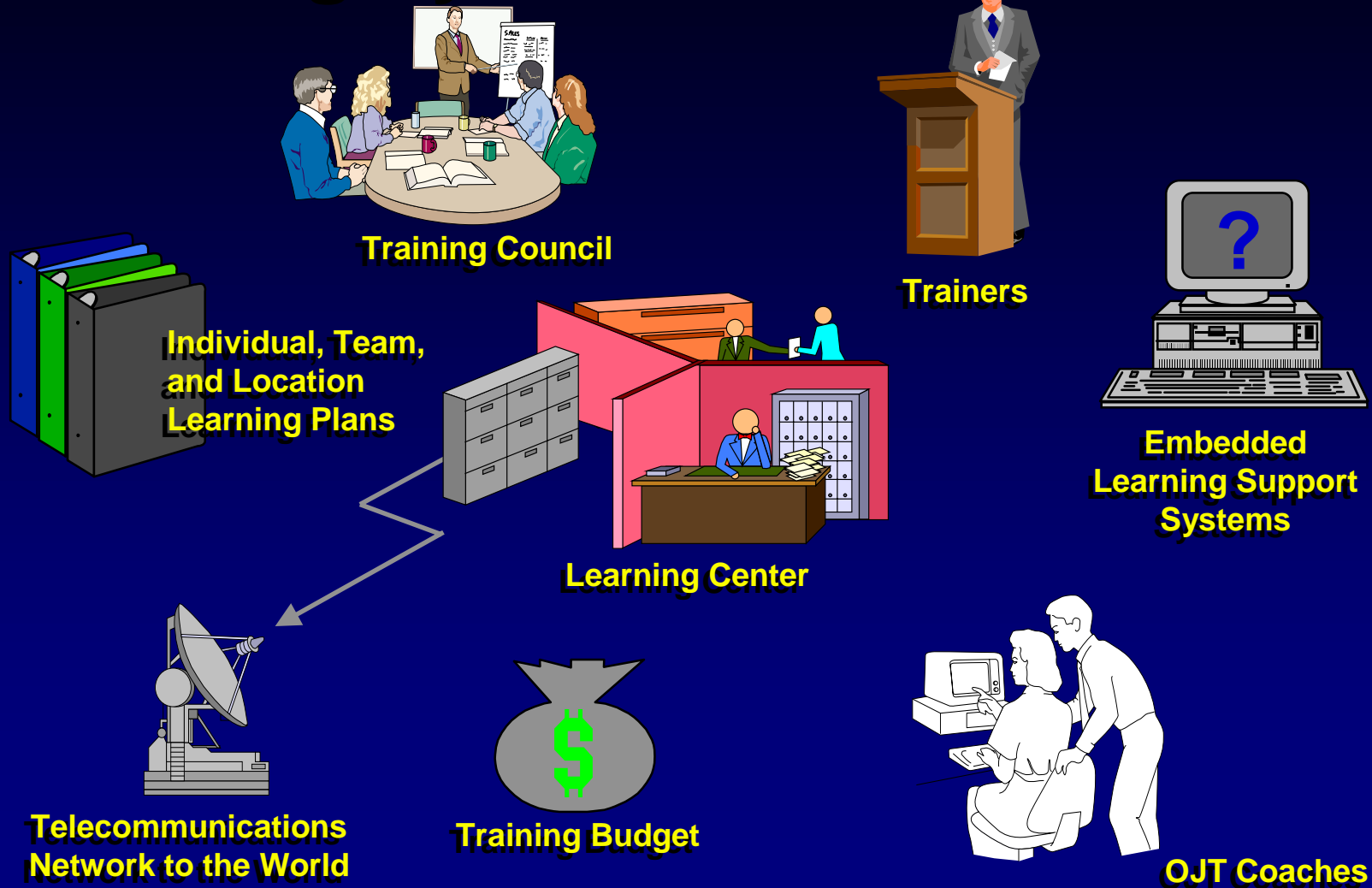
Example: T&D Organization Structure



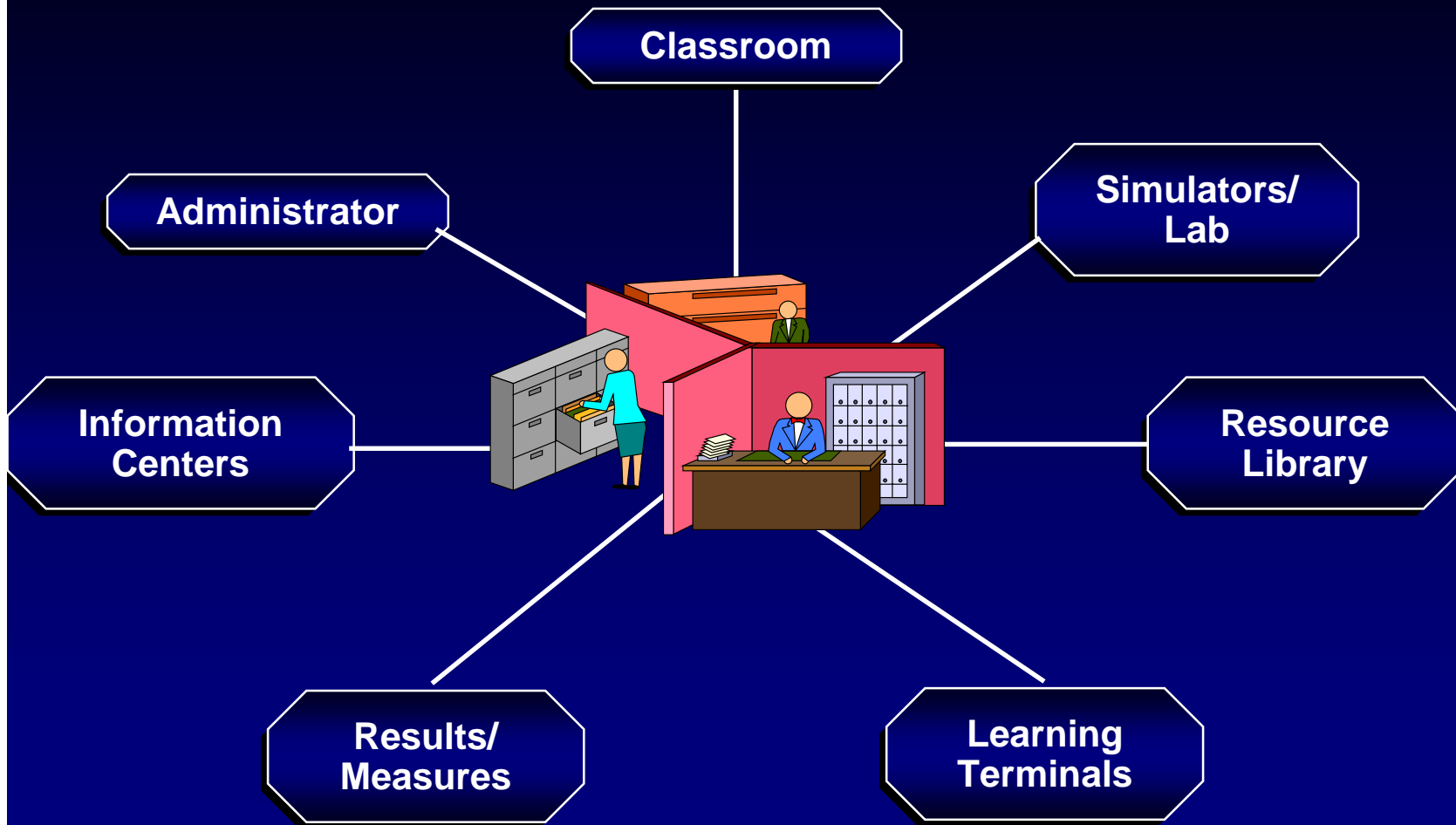
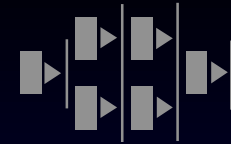
Example: T&D Governing Structure



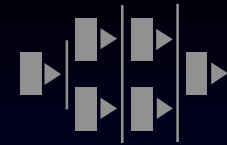
Example: Workplace Learning System



Example: Learning Center



Delivery Systems by Instructional Mode



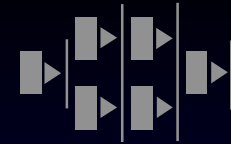
Group-paced (instructor-driven)

- **Lecture/discussion**
- **Case group**
- **Action learning**
- **Laboratory**
- **Video**

Self-paced

- **Conventional paper and pencil media**
- **CBT/multimedia**
- **Simulator/lab**
- **Video**
- **Expert systems**
- **Embedded (computerized Help screens)**
- **Tutorials**
- **Structured/unstructured OJT and work assignments**
- **Internet and Intranet**

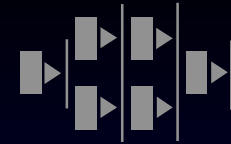
What Can We Do to Implement Business-driven T&D?



- **Develop a Strategic Plan for Training & Development**
- **Implement/improve the T&D systems, making targeted, sufficient *investments* to achieve the required business results**

Note: Just because trainers are skilled at uncovering training requirements does not in and of itself warrant meeting those requirements

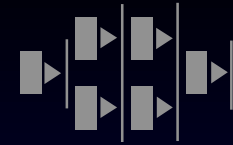
Definition



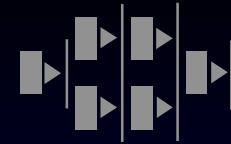
A Strategic Plan for Training & Development

- **Is a cumulative composition of several outputs from each phase within our four-phase process model; it**
 - Defines the high-priority business challenges and goals**
 - Defines the T&D products needed to achieve the high-priority business goals and defines the T&D systems needed to acquire/develop, deploy, and administer the overall T&D product line**
- **Provides a comprehensive business plan for meeting these needs according to business priorities**

Questions Answered by the Plan

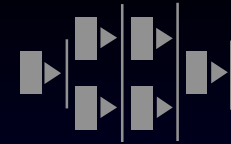


Questions Answered by the Plan



- 1. What are our business challenges, goals, and strategies?**
- 2. What knowledge/skills are needed to reach our goals?**
- 3. How can we make sure our employees, customers, and suppliers have know-how ; what is training's role?**
- 4. How adequate is the present learning system?**
- 5. What should our system look like in three to five years?**
- 6. What are our strategic learning goals?**
- 7. What strategies will we adopt to reach our goals?**
- 8. What workload do we estimate to execute our strategies?**
- 9. How many resources do we need to commit; what ROI?**
- 10. What organizational and management systems do we need?**
- 11. How shall we implement the plan?**

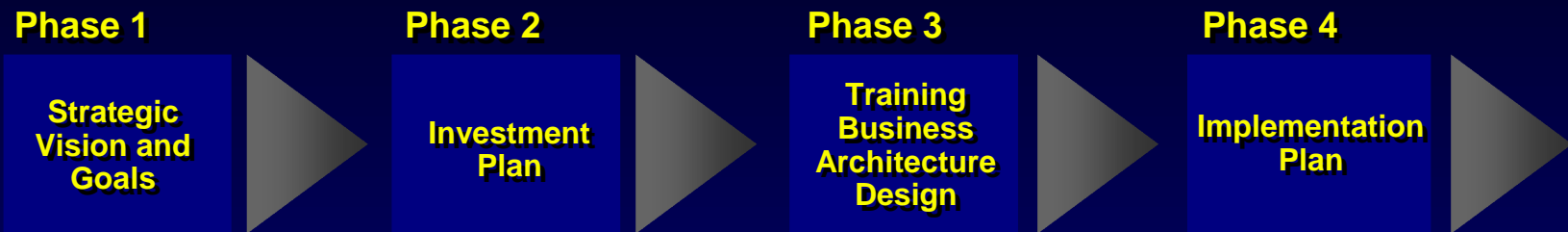
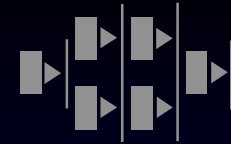
Section 5



**SWI's
Four-Phase, Gated Process
for**

**Strategic Planning
for
Training & Development**

SWI's Four-Phase, Gated Process for SPT&D



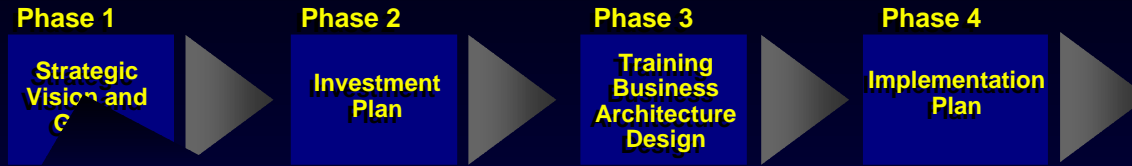
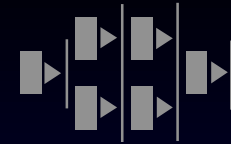
Phase 1 **Strategic Vision and Goals**

Phase 2 **Investment Plan**

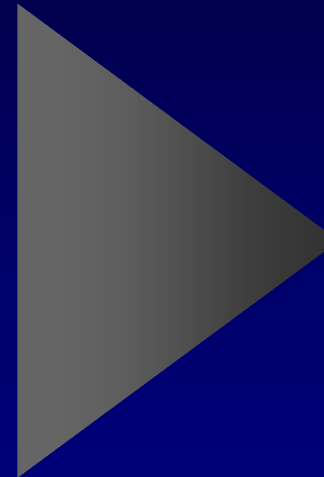
Phase 3 **Training Business Architecture Design**

Phase 4 **Implementation Plan**

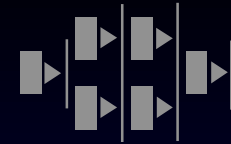
Phase 1



Phase 1
**Strategic
Vision and
Goals**

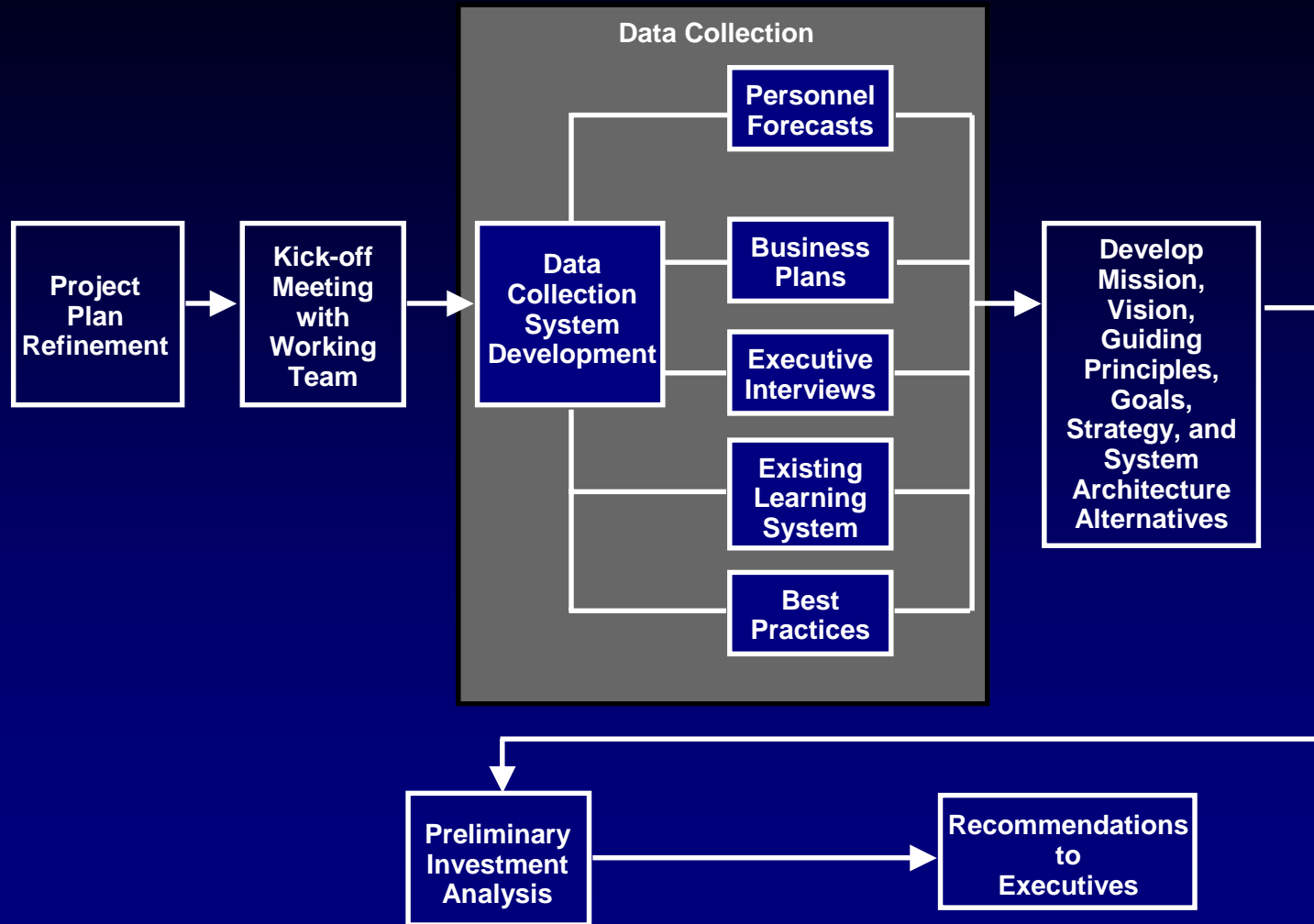


Phase 1 Outputs

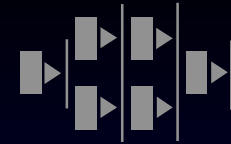


- **Training implications of business challenges and plans**
- **Assessment of the existing T&D system**
- **Mission, philosophy, and roles for T&D**
- **Strategic vision and goals for T&D**

Phase 1 Flow Chart



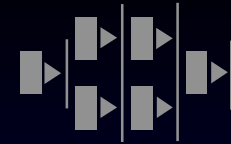
Interviewing Executives



- 1. What are the most significant challenges facing the business and/or your part of the business?**
 - **Markets**
 - **Competition**
 - **Technology**
 - **Products and services**
 - **Supplier/customer relationships**
 - **External regulations**
 - **Management and workforce issues**
- 2. What strategies and goals have been established to address these challenges?**
- 3. What groups of people will need new knowledge or skills for these goals to be achieved?**

Interviewing Executives

(continued)



4. **What is the downside business risk if we do not have or develop people with the new knowledge and skills? (be as quantitative as possible)**
5. **Are you willing to provide support in the form of**
 - **A training budget to meet these needs?**
 - **Your time and the time of your organization to help establish priorities and provide overall guidance?**

Phase 1 Executive Review Point: Strategic Direction Decision Point



Purpose

Gain commitment of executives to training vision and direction prior to detailed cost analysis/planning

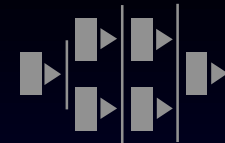
Criteria

- Key business challenges, strategies, and goals are identified
- Training implications are believable
- Assessment of strengths and weaknesses of present training system is valid
- Mission, roles, philosophy, and vision are acceptable/strong
- Executive commitment to direction and goals is obtained

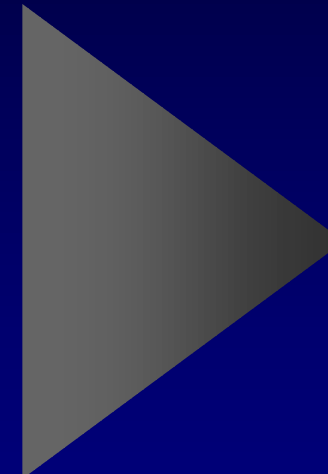
Tips

- Heavy executive input upfront
- Mission/vision, etc. “socialized” before presenting for approval

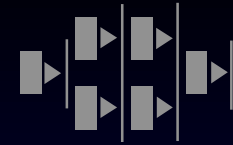
Phase 2



Phase 2
Investment Plan

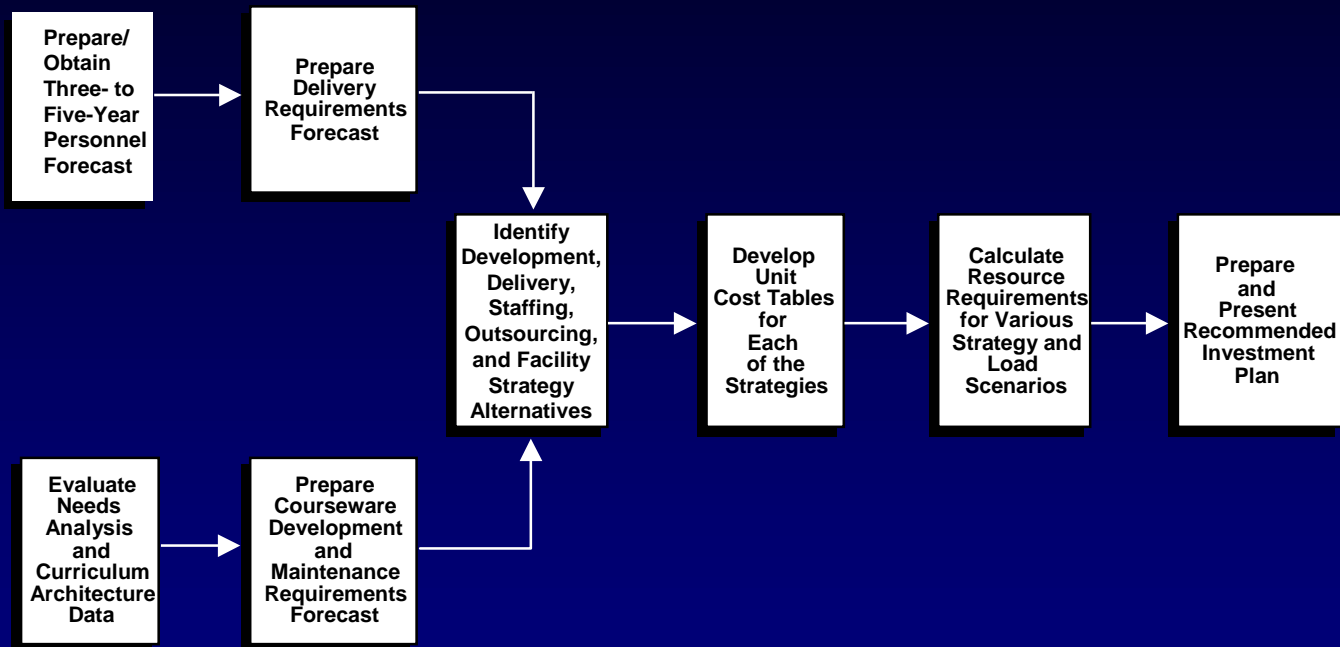
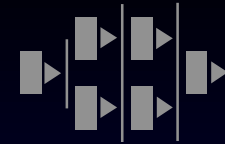


Phase 2 Outputs

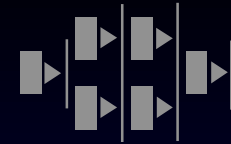


- **Quantitative needs forecast**
- **Alternative strategies for meeting the needs**
- **Resource requirements for alternative scenarios**
- **Strategic approach(es)**
- **Three- to five-year investment plan**

Phase 2 Flow Chart



Phase 2 Executive Review Point: Major Financial Decision Point



Purpose

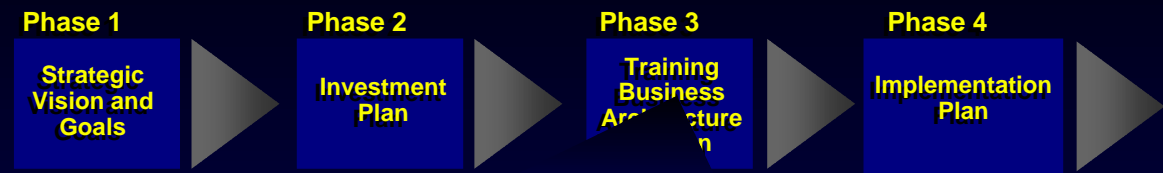
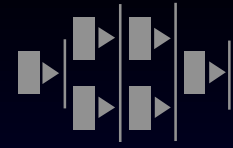
Gain commitment for resourcing the three- to five-year plan prior to investing in the design of the necessary organizational support systems

Criteria

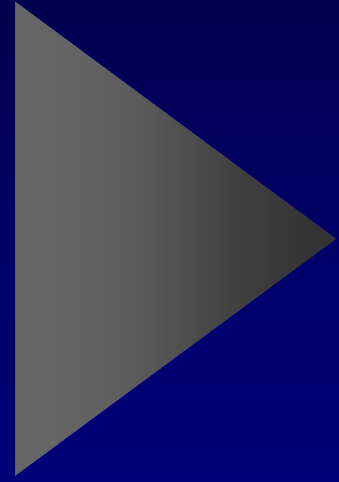
- Alternatives are clear with varying levels of resource requirements
- Business needs are addressed to varying levels
- Tradeoffs and risks associated with alternatives are clear and realistic

Tips

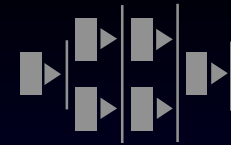
- Let the executives make the decision—provide alternatives
- The resource requirements are likely to be greater than current levels



Phase 3
Training Business Architecture Design

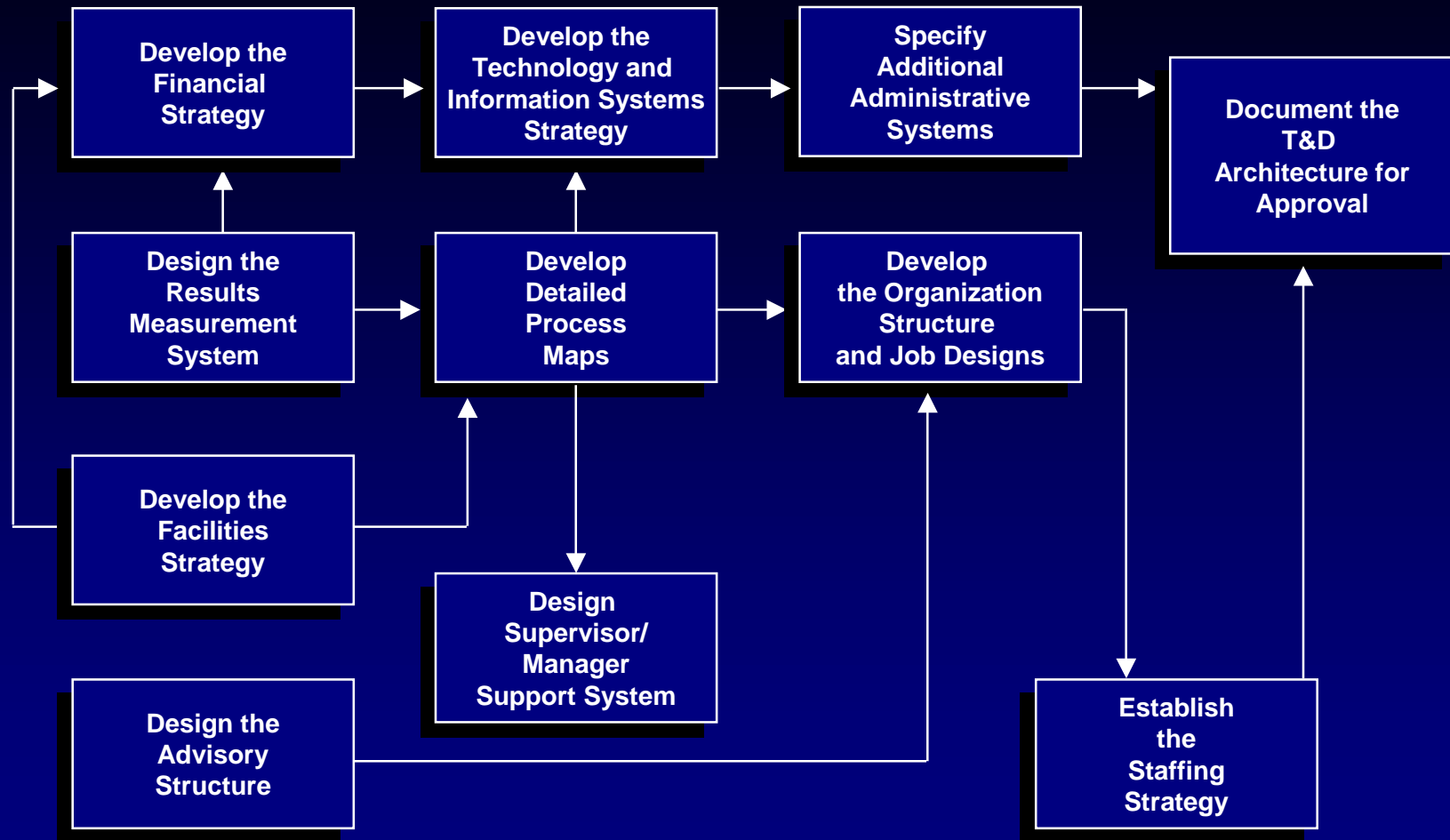
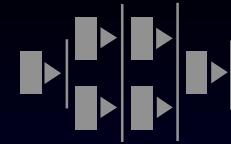


Phase 3 Outputs

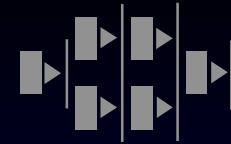


- **Results measurement plan**
- **Process Maps and measures**
- **Organization structure evolution plan**
- **Governing/advisory structure**
- **Staffing strategy**
- **Technology and information systems strategy**
- **Facilities strategy**
- **Financial strategy**
- **Supervisor or manager support system**

Phase 3 Flow Chart



Phase 3 Executive Review Point*: Training Business Architecture



Purpose

Approve plans before implementation

Criteria

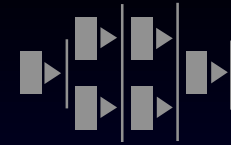
- Decisions require executive input
- Alternatives and details available where needed

Tips

- Minimize use of executive time
- Keep decisions at a high level where possible—avoid getting bogged down in details of decision

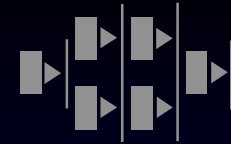
***Optional:** This step may be omitted, except for those few decisions that require heavy investment or high-level policy review

Results Measurement Plan Elements



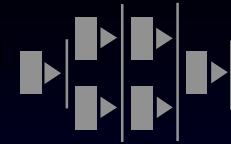
- **Hierarchy of measures to be used**
- **Strategy for collecting and storing the data**
- **Plan for a system of regular reports to stakeholders**
- **Plan for developing and implementing the system**

Process Maps and Measures Elements



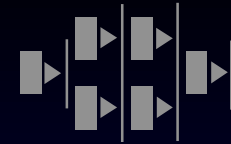
- **Macroprocess Map identifying all T&D processes**
- **Process Maps for each individual training process (e.g., courseware development)**
- **Performance measures for each process (e.g., cost, cycle time, and quality)**

Organization Structure Evolution Plan Elements



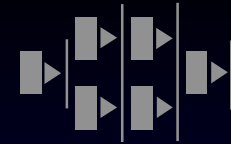
- **How many training departments will you have?**
- **What are their missions, roles, and scope of responsibility?**
- **How will they coordinate to achieve the overall investment plan?**
- **How will they be structured internally?**
- **How will you evolve to this new structure from what you have today?**

Governing/Advisory Structure Elements



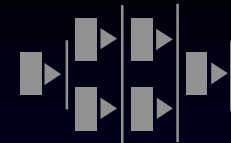
- An overall governing system
- Mission, roles, and membership rules for each advisory group
- A plan for linkage to the training departments
- A plan for creating or evolving the structure

Staffing Strategy Elements



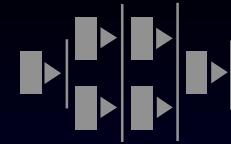
- **A definition of the needed mix of talents to staff the jobs in the organization structure**
- **Sources for these talents (line organizations, consultants, college hires, etc.)**
- **Policies for recruiting, selection, retention, and career management**

Technology and Information Systems Strategy Elements



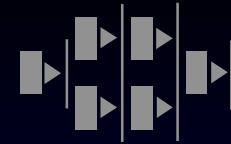
- **High-level specifications for technologies to be acquired and/or deployed (e.g., distance/learning technology)**
- **Deployment strategy**
- **T&D information system architecture, including integration with other information systems**
- **High-level specifications for information system**

Facilities Strategy Elements



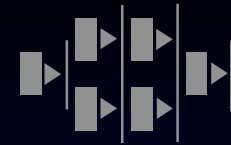
- **Kinds of training facilities needed**
- **Location of training facilities**
- **Capacity requirements over a five- to ten-year forecast period**
- **Cost**
- **Risk of obsolescence with changing training technologies**

Financial Strategy Elements



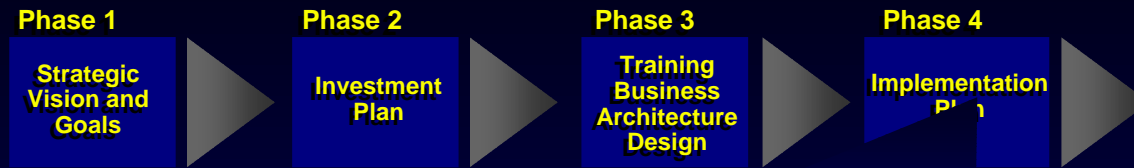
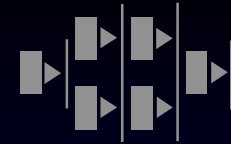
- **Financial strategy for**
 - **Development budget**
 - **Operations budget**
 - **Capital budget**
- **A system for data collection and financial control**
- **A policy on financial accountability to whom and for what**
- **A plan to develop and implement the system**

Supervisor or Manager Support System Elements

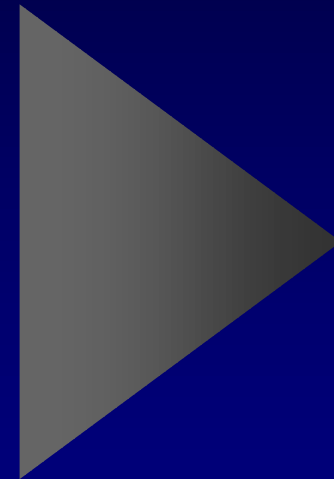


- Information systems and communication channels
- Job aids and procedures
- Training for supervisors and managers
- Training coordinator

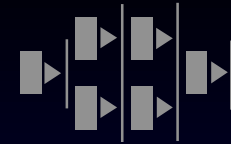
Phase 4



Phase 4
Implementation Plan

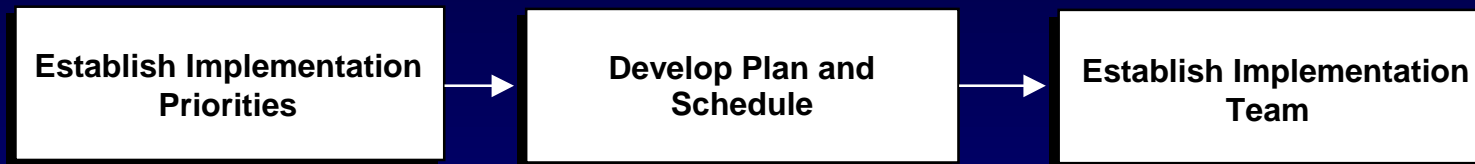
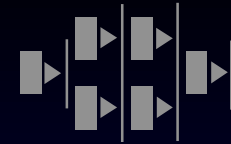


Phase 4 Outputs

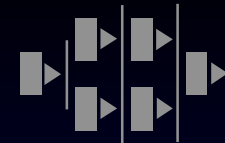


- **Detailed implementation plan**
 - Implementation activities lists
 - Milestones to monitor progress
 - Assignments of accountability
 - Resource allocations for implementation tasks
 - Progress tracking and reporting system
- **Final documented Strategic Training Plan**

Phase 4 Flow Chart



Phase 4 Executive Review Point: Implementation Kick-off



Purpose

Provide visibility of “next steps” to management

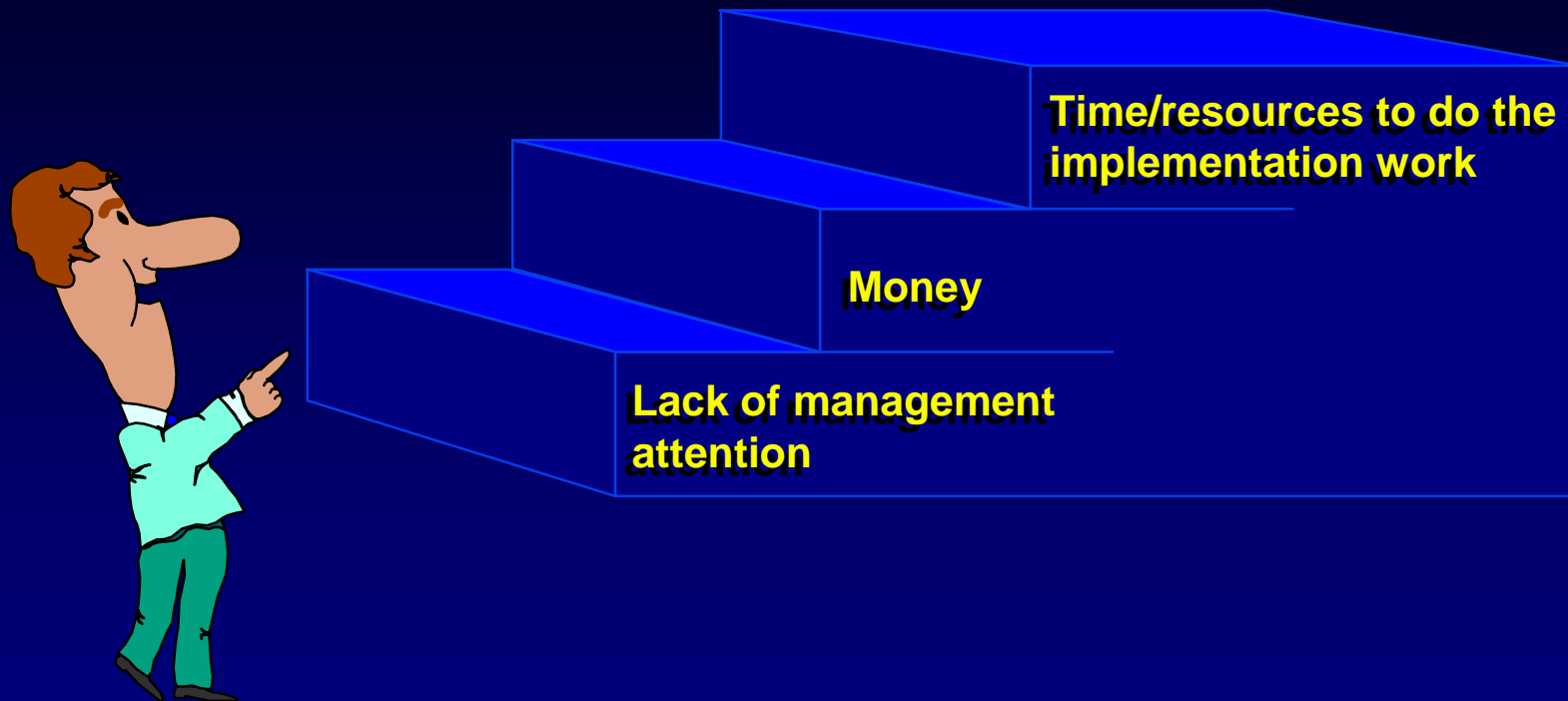
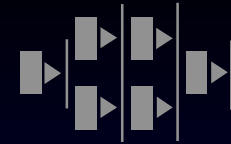
Criteria

- Plan covers next phase at a task level
- Milestones and deliverables clearly defined
- Individual accountabilities identified
- Time frames are reasonable, but within management expectations
- Resources adequate to accomplish objectives

Tips

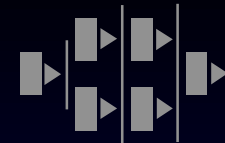
- No surprises—people listed in the plan should be aware of (and have agreed to) their roles
- If no executive decisions are required, this review can be a briefing (or a memo)
- “Socializing” the plan upfront will help ensure a “Go” decision

Barriers to Overcome



The key to success in implementation is a solid accountability link between the implementing project teams and management

Ongoing Executive Status Reviews



Purpose

Review progress toward plan, changes, and associated resource requirements, and maintain project visibility

Criteria

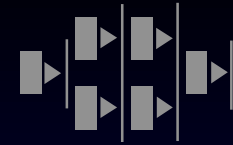
- Business issues arising since initial plan are addressed
- Progress/status is clear, deviations from the plan are explained
- Changes (and associated resource requirements) are documented

Tips

- Get input upfront through official communication channels, personal network, or individual executive interviews prior to status meeting
- Have details available, but keep executives focused on higher level issues
- Use the plan as a guide throughout the project—otherwise, the effort can get “off track” and become difficult to show status

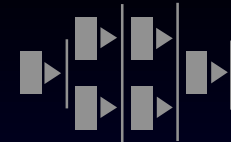
For annual updates, four phases with executive reviews are usually unnecessary

Section 6



Planning a Strategic Plan for Training & Development Project

Before You Even Start Phase 1



Phase 0: Project Planning and Management, a.k.a. “Organizing the Planning Project”

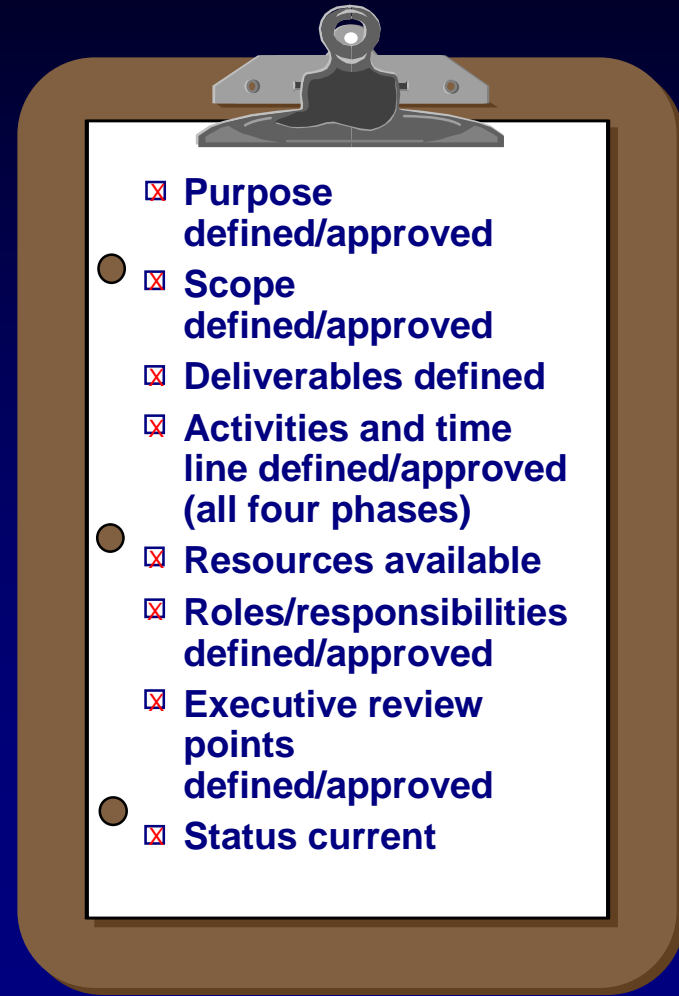
Purpose

1. Document scope, roles, and project activities for the team and management
2. Track and communicate progress and changes with respect to project tasks for team and management

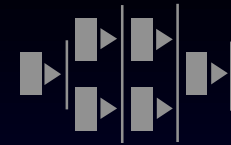
Key activities

- Planning (establishing scope, goal, time frame)
- Negotiating resources

This is an ongoing process throughout the project



Project Planning and Management

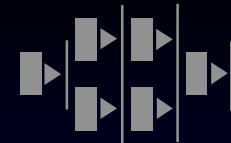


A major key to success or failure is the way you organize and manage the Project Plan

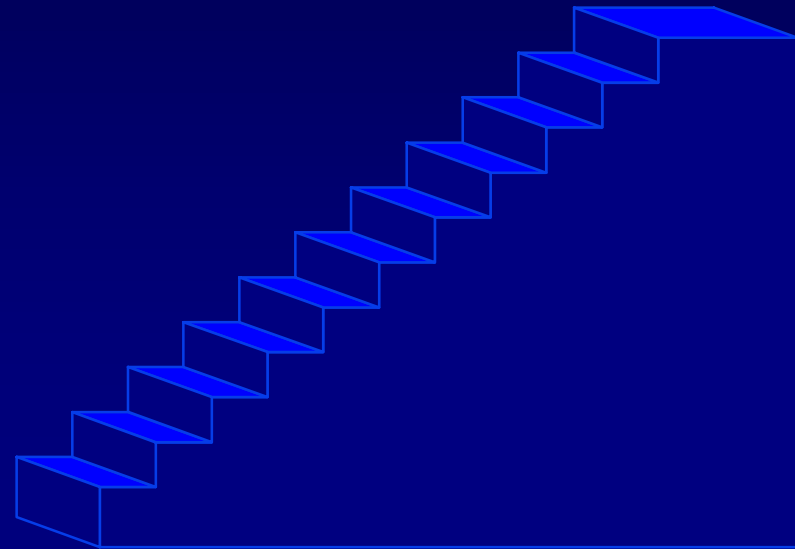
Risks of Poor Project Planning and Management



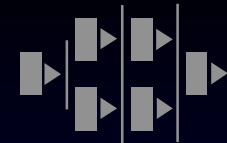
Project Planning and Management Steps



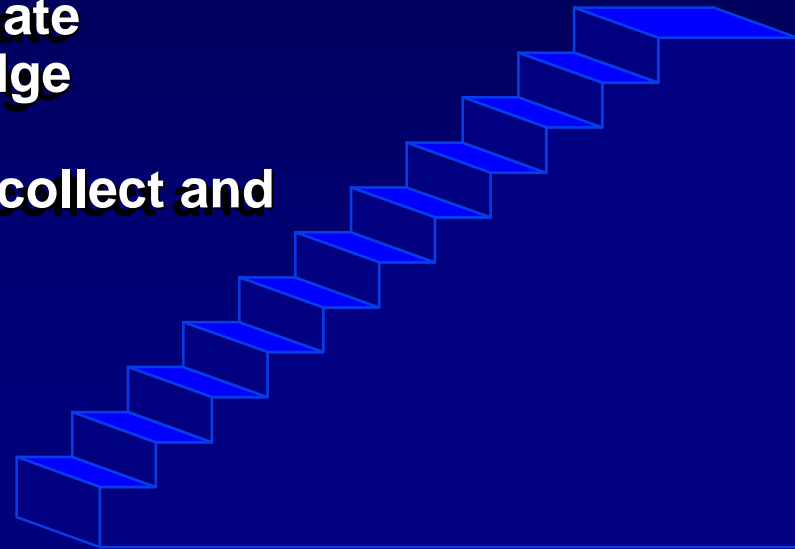
- **Scope the project**
- **Recruit an executive sponsor**
- **Select the Planning Team**
 - Steering Team
 - Working Team
 - Planning staff
- **Select the project leader**
- **Draft the Project Plan**
- **Review the Project Plan with and get commitments from all members of the Planning Team**



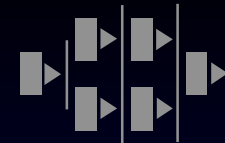
Project Planning and Management Steps (continued)



- Obtain commitment from executive sponsor and Steering Team
- Keep the project moving and on schedule
- Assign a data manager
- Collect, manage, and disseminate data, information, and knowledge
- Utilize information systems to collect and manage data
- Build consensus
 - Inform
 - Negotiate
 - Decide

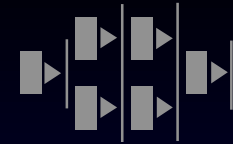


SPT&D Project Planning Template



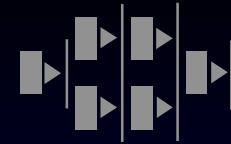
PROJECT TASKS	Estimated Resources (Days)						Schedule	
	ST	PM	WT	DST	IST	Other	Start	End
(see handout)								
<p>Key:</p> <ul style="list-style-type: none"> ST = Steering Team PM = Project Manager WT = Working Team DST = Data Subteam IST = Investment Subteam 								

Section 7



Selling the Strategic Plan for Training & Development Project

SPIN[®] Sales Process



Situation

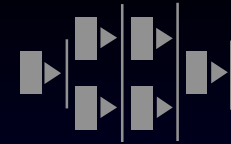
- Major initiatives
- Lots of change
- Training not seen as a value-added business partner
- Out-of-date training methods and technology
- No clear focus on training needs
- Employee complaints about training

Problems

- Ineffective implementation of initiative and technologies
- Wasted money on ineffective or unnecessary training
- Employee morale problems
- Customer dissatisfaction

SPIN[®] is a registered trademark of Huthwaite Corporation

SPIN[®] Sales Process (continued)



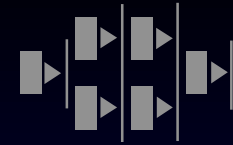
Implications

- Loss of competitive advantage
- Lost customers
- Lost revenues
- Unnecessary cost
- Overall loss of business performance

Need-Payoff

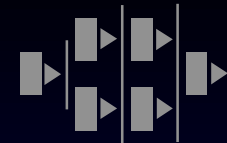
- Develop a Strategic Plan to realign T&D with business requirements

Section 8



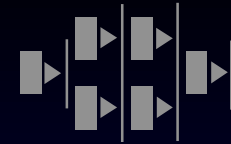
Session Summary

Benefits of Developing a Strategic Training Plan



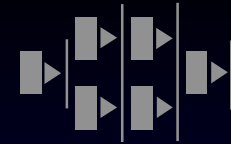
- **Puts top management in control of its investment in human capital development**
- **Develops credibility with line management**
- **Creates a comprehensive system to focus on high-priority business needs**
- **Realigns training with changing business paradigm**
- **Training becomes a proactive rather than a reactive function**
- **Eliminates wasted time and money spent on training in low-priority areas**

Lessons Learned



- **Using a large Working Team drawn from across the organization helps with buy-in for the project but stretches the project schedule**
 - Time required for team learning
 - Logistics of scheduling meetings
- **Organizing best practices visits, including both the executive groups and the Working Team**
 - Has a very high payoff
 - Is very difficult logistically
- **Performing external benchmarking requires a great deal of scheduling time**
- **Preselling business units, discipline, and company-level executives**
 - Is essential to gaining commitment
 - Requires lots of time and hard work

Lessons Learned (continued)



- **Selling a resource budget based on the high-level needs assessment where the company has no experience with some of the new services is difficult**
- **Having executive sponsorship throughout the project really pays off; having a combination of line and human resources sponsors is ideal**
- **Getting the right sponsor, Steering Team, and Working Team is critical**
- **Obtaining executive committee approval at key milestones is critical**
 - Kick-off
 - Midpoint
 - Final approval
- **Having a linkage to business strategies is essential**
- **Dedicating a project manager is vital**

Strategic Planning for Training & Development Process



Project Planning and Management

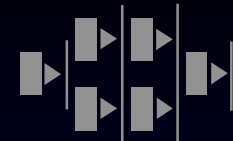
- Purpose
- Scope
- Activities and time lines
- Resource requirements
- Planning roles
- Executive review points



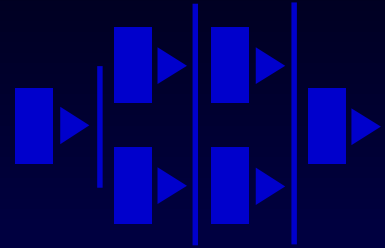
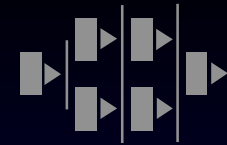
—●— = Executive review point

Human
Competence
is

The
Competitive
Edge



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