**Training Strategy & Development**

Having highly trained, skilled employees who continue to grow in their abilities benefits both the employee and the organization.

* ***Employees*** feel valued and gain the skills and confidence needed to be successful in their roles.
* ***Companies*** that consistently invest in training see higher results in productivity, profitability, and customer satisfaction. Countless studies show that the right training will prepare future leaders, raise performance standards, and improve employee retention and morale.

This Training Toolkit is designed to assist you in creating a successful training initiative. It contains a step-by-step process and many tools, samples, and templates to use along the way. In case you require support, guidance or additional resources, such as pre-developed training, to support your efforts, contact Catapult’s Training Department.

**How to Use:**

Whether your training will be virtual or in-person, at your office or offsite, and whether you or an external trainer facilitates the program, this Toolkit can assist you. You may find it helpful to follow each step in the process from beginning to end, or to pick and choose the specific steps and tools that will help address your organization’s most immediate training needs.

**Catapult’s Training Philosophy**

The core objective of Catapult training is to help leaders and employees improve performance by successfully transferring the new skills, behaviors and knowledge they are introduced to in the courses back to the job. To do this, we design and develop programs that are based on proven learning principles and practices.

Catapult training includes:

* Content based on research from top leadership/industry experts and employs adult learning theory techniques
* Clearly articulated course learning objectives and expectations
* A learning model that focuses on awareness, practice, and application
* Use of role-plays and real-life case studies to engage learners in “doing activities”
* Assignments and group activities that facilitate collaborative peer learning
* Action planning which accelerates the transfer of learning back to the job

**Seven Steps to an Effective Training Program**

An effective training program is built by following a systematic, step-by step process to ensure your overall goals are being met.

**Step 1: Get Started**

**Description:**

In order to create a successful training initiative, three key elements should be considered:

1. Company Strategic Priorities and Goals - It is essential to have and to be familiar with the company’s strategic priorities and goals. Each training solution should support these bigger organization goals. Furthermore, the ability to articulate how the training solution links to strategic priorities both today and the future will be crucial.
2. Key Stakeholder Buy-In - A critical part leading to the success of any training initiative will be the support and buy-in of key stakeholders in the organization.
3. Definition of Roles and Responsibilities - To ensure success, it is important to define the roles and responsibilities of those responsible for and influenced by the training initiative.

**Why this is Important**:

* Ties the training to the bigger picture
* Contributes to maximum impact of time and investment
* Provides clarity and ensures accountability at all levels •
* position the training as important and ensures everyone understands “the why”

**Mistakes to Avoid:**

* Lack of clarity about the purpose of the training initiative
* Lack of real buy-in and commitment from top leadership
* Uncertainty about roles and responsibilities, which creates frustration and may prevent the success of the initiative

**Key Questions to Consider:**

* What are the company’s strategic goals?
* How will we connect and articulate how the training initiative supports strategic priorities?
* Do we understand the business challenges and how the solution will align with culture, values and needs?
* Do we have an executive sponsor or champion and are we maximizing his/her engagement?
* How will we ensure our management team and senior leaders are all on the same page and support the training?
* How can we ensure that it is not viewed as an “HR or Training thing”?
* How will we get buy-in and ensure everyone understands “the why”?
* What obstacles do we need to anticipate?
* Who is responsible for what?

**Step 2: Assess Needs**

**Description:**

After identifying the company’s strategic goals and establishing buy-in and responsibilities, the next step is to identify and assess needs. The training needs assessment will identify gaps in the organization, tasks and individual performance. These gaps are then analyzed and prioritized and turned into the organization’s training objectives. In this dynamic environment, it is critical to evaluate training needs for the future, not just current state. It is important to be aware that not every performance gap will be resolved by training and often there are bigger organizational issues that need to be addressed.

**Why this is Important:**

* Avoids “hit or miss” training
* Allows for decisions to be made using data rather than intuition
* Provides base-line information for use in evaluating effectiveness
* Permits HR/Training professionals to prioritize for maximum impact

**Mistakes to Avoid:**

* Conducting a formal needs assessment when one isn’t needed or supported
* Relying on limited sources of information to determine needs
* Not getting managers involved in the process
* Using tools that make it difficult to summarize findings into data to take action on
* Relying on training fads or demands from senior managers to determine training needs

**Key Questions to Consider:**

* Do we need a formal assessment or are we aware of our immediate development needs?
* Do we have the time and resources to conduct a formal assessment?
* Who will we assess? The entire company? A select group of individuals?
* What are the most useful sources of information to determine our training needs? Observation? Questionnaire? Performance Reviews? Interviews? Data currently being generated?
* What do we want our employees to do differently based on participation in the training initiative? •
* What skill development is needed for future success?
* Is training really the answer or are there bigger organizational issues that need to be addressed?

**Step 3: Create Plan Description:**

Once the company’s training needs have been determined and prioritized, a comprehensive training plan can be created. With the training budget in mind, a decision will be made as to which training needs can be met internally and which will be outsourced. For the training that will be outsourced, research and selection of training providers will occur.

Finally, everything is compiled into a written training plan. The plan may be a spreadsheet such as the template provided below, or be more descriptive in nature. Either way, the plan will include elements such as:

* Course name, description and objectives
* Logistics: dates/times, location, who will attend, training provider, resources, delivery method
* How and what communication regarding the training initiative will occur
* How success will be measured Why this is Important:
* Leadership, training participants and others involved in the training initiative will:
	+ understand the purpose and value of the training - be less likely to object to or cancel participation in the training - be prepared for the training
	+ Coverage for those attending training will be arranged
	+ The most effective learning environment, methodology and resources will be used Mistakes to Avoid:
	+ Having a large group attend a training course that will only benefit a few
	+ Scheduling a training class when a lack of skills or knowledge is not the issue • Neglecting to identify measurements of success in advance of the training
	+ Scheduling during your peak season or during busy times Key Questions to Consider:
	+ Have we fully involved key business stakeholders in the process?
	+ What is our budget? If our budget is not large enough to accommodate all training needs, what criteria will we use to prioritize?
	+ What are the key messages we are sending about expectations for participants? Managers?
	+ How will we determine success? What measurements will we use? • How will we communicate about the training within the organization?
	+ Is the training mandatory? What if it is not completed?

**Step 4: Prepare Participants**

**Description:**

Research shows the effectiveness of developmental training for an employee is heavily influenced by their manager’s encouragement and support. A few ways to provide support prior to training implementation include:

1. Provide general information about the training initiative, both verbal and written to include:
* Logistics – time, location, etc.
* Explanation of expectations for both participants and managers
* Brief rundown on what the program will entail and what employees can expect
* Responses to any concerns that employees may have
* Summary of the overall learning process
1. Hold 30-minute meetings between the manager and the employee to review course objectives, set expectations, develop goals and gain commitment. At the conclusion of the meeting, schedule a 30- minute follow up meeting to be held within a week of completing the training. (If managers are not familiar with this process, it may be beneficial for HR to conduct a brief training session, and/or attend random meetings to model and support manager development.)

**Why this is Important:**

* Participants understand why they are attending the training
* Participants will be more likely to look for specific ways the training might help them reach the pre-set goals
* Both manager and participant know what success looks like and can therefore evaluate the results of the training program
* Participants understand that they will be held accountable for taking action

**Mistakes to Avoid:**

* Managers that do not know how to conduct the pre and post training meetings
* Not giving the participants enough notice that they will be attending the training
* Not providing a clear explanation as to the reason for the training

**Key Questions to Consider:**

* Do we understand the purpose of the training so that we can communicate it clearly?
* What can we do to get higher level leaders involved to ensure management support?
* How can we train, encourage and hold our managers accountable?

**Step 5: Implement and Evaluate Description:**

**Description:**

The implementation phase is where the training program comes to life. The training program is officially launched and conducted. The training initiative should be continually monitored to determine program and instructor effectiveness, and knowledge or skill acquisition. Success is measured using learning objectives or metrics established prior to the implementation of the training program.

**Why this is Important:**

* Opportunity for senior leaders to reinforce the importance of the training and its connection to the company’s bigger goals and direction
* Demonstrates commitment to a quality learning experience
* Maximize payoff for the time and investment
* Feedback data can be collected to determine the effectiveness of the training

**Mistakes to Avoid:**

* Conducting training at your organization without a leader opening/closing the training
* Failure to select the appropriate trainer or course
* Not having previously set success measurements so evaluation is difficult
* Not having a back-up plan for employees who do not complete the training

**Key Questions to Consider:**

* If the training is at our company, what leader(s) will kick off the training?
* What are the messages we want to make sure are communicated?
* If the training is at our company, how will we handle workplace interruptions?
* How will we evaluate the effectiveness of the training?
* What is the plan for employees who do not complete the training?

**Step 6: Transfer Learning**

**Description:**

The transfer of learning stops at the designer and trainer and shifts to managers and supervisors. Managers and supervisors must provide encouragement and support so that the new knowledge, skills and abilities are incorporated into the workplace. With management support, performance will improve and the results of training can be quantified in a meaningful manner. A few ways to support the transfer of learning to the workplace and facilitate the maximum application of new skills and behaviors back on the job include:

1. Hold 30-minute meetings between the manager and the employee to create and implement action plans. At the conclusion of the meeting, schedule the next 30-minute follow-up meeting. (If managers are not familiar with this process, it may be beneficial for HR to conduct a brief training session, and/or attend random meetings to model and support manager development.)
2. As employees complete the training programs, pull together groups of people who have completed the same course(s) to discuss their learning and next steps. These meetings could be facilitated by leaders in your organization or by HR.

**Why this is Important:**

* Learning is transferred to the workplace and performance improves
* Employees feel supported and understand there is accountability in regard to application
* Opportunity to practice new skills and behaviors to gain confidence
* Managers can evaluate what further development is needed

**Mistakes to Avoid:**

* Neglecting to hold follow up meetings with employees
* Creating action plans but not holding participants accountable for executing them
* Expecting change when the workplace does not support the training concepts and objectives

**Key Questions to Consider:**

* What is the biggest obstacle in our workplace that might prevent the transfer of learning? What can we do about it?
* What do we need to do to ensure managers are accountable for their role in supporting the learning process?
* What can we do to support the application of learning back on the job? •
* we need to complete a training for managers and provide one-on-one coaching to ensure consistency and quality?

**Step 7: Development Planning**

**Description:**

An Individual Development Plan (IDP) is an action plan used to leverage current strengths and talents, and to help identify and develop new skills and behaviors for the future. The IDP fulfills the mutual goals of individual career development and organizational enhancement by aligning employee development with your company’s mission and goals. Individual development plans (IDPs) are a great way to ensure accountability and maximize application of new skills and behaviors back on the job.

**Why this is Important:**

* Aligns employee training and development efforts with the company’s goals and objectives
* Assists in growing leaders and building a strong talent bench
* Reduces the risk of losing top talent and supports long term loyalty
* Supports employee attraction and retention by demonstrating a commitment to development
* Provides managers a roadmap for having better conversations
* Provides a tool for employees to play an active role in their own professional development

**Mistakes to Avoid:**

* Not focusing on the right individual development goals
* Lack of specificity around goals and timeline
* Not following through once the IDP has been created
* Getting caught up in the form—it is all about the conversation, the commitment and action

**Key Questions to Consider:**

Will my company’s culture allow time for completion and follow through on IDPs?

How will we tie the IDP into our overall performance management process?

What on-the-job developmental opportunities are available in my organization?

How will we educate management in regard to the importance of IDP’s?

What are the metrics we will use to ensure success? Percent of employees with IDPs? Number of internal promotions? Decreased turnover in certain positions? Increased overall retention?

**Summary:**

In today’s changing workplace, every organization, no matter what size or what industry, has an opportunity to utilize the development of employees as a significant strategic advantage to impact performance, productivity and results. Every company can utilize training as a vehicle to:

* Help leaders understand their impact and recognize specific leadership behaviors that support a positive and healthy workplace
* Develop supervisors and managers to have productive and meaningful conversations to increase employee engagement and manage performance
* Grow future leaders and develop a strong bench
* Build a loyal and highly talented workforce
* Show employees that working for the company is not just a job, but a career
* Engage the new generation of workers and maximize their talents in the workplace

By training and developing your workforce the right way and providing them with the knowledge, skills and tools they need to succeed, you are adding value to your organization and supporting future organizational growth. Whether you are looking at a long-term training plan or have immediate needs, whether you have peak productivity times to schedule around or multiple shifts to cover, whether you have many people to train or just a few, whether you know what you want to do or don’t know where to start— Catapult is here to assist you. We can help you think through your options and make recommendations that are right for your organization. Contact our Learning team today to find out more: (866) 440-0302 or view our training library for courses to supplement your plan: <https://letscatapult.org/learning-events/classes-events/>