WESTERN OHIO CHAPTER

ASTD

Linking People, Learning & Performance

# professional INSIGHT

JUNE / JULY 2005

## Chapter Meeting

**July 21 - Breakfast Program**
**Wright State University**
**Faculty Dining Room of the Student Union**
**7:00 a.m.**

*To reserve your place, contact the Affiliate Societies Council by noon, Tuesday, July 19.*

## Reservations~

When making reservations, please provide your name, organization, phone number, and whether or not you are a member.

**You may:**
- call 937-224-8513 and leave a message 24 hours a day.
- fax a memo to 937-224-0644.
- E-mail to ASC@DNACO.NET

| | Lunch | Dinner |
|---|---|---|
| Networking | 11:30 | 5:30 |
| Meal | 12:00 | 6:00 |
| Program | 12:30 | 6:30 |

| Cost: | Lunch | Dinner |
|---|---|---|
| Members | $20.00 | $25.00 |
| Guests | $29.00 | $35.00 |

## What's Inside~



## SPECIAL DOUBLE ISSUE

## JULY BREAKFAST MEETING - JULY 21

# 2005 ASTD International Conference Review

**Speakers**: **Ron Fetzer, PhD., Miami University, Pam McCallum, M.S.I.R., President of Leadership Resources, Inc., Cris Wildermuth, M.Ed. of the Diversity Effectiveness Group, LLC, and Victor Boccia, LexisNexis Customer Support - Performance Improvement Consultant**

SPECIAL TIME AND LOCATION – FACULTY DINING ROOM OF THE STUDENT UNION ON THE CAMPUS OF WRIGHT STATE UNIVERSITY, DAYTON, OHIO

| | |
|---|---|
| 7:00 A.M. | NETWORKING & BREAKFAST ALA CARTE |
| 7:30 A.M. | PROGRAM – ASTD NATIONAL CONFERENCE REVIEW |
| 8:30 A.M. | CONCLUSION |

Please note the following important items:

1. **Parking** - There is plenty of parking available close to the Student Union. (most free of charge)
2. **Breakfast** - Breakfast will be available via the WSU Student Union Market Place Food Court which opens at 7:00 AM. You will be responsible for purchasing your own breakfast.
3. **Program fee** - Because WOCASTD will not be providing breakfast and most parking is free a special discounted price of only $5.00 per person for everyone will apply for attending this meeting.

***Program Content***

Local training and development professionals will provide their insight and perspective on this year's ASTD International Conference, and will review five of this year's outstanding educational sessions including:

***What Every Training and Performance Professional Should Know About Copyrights.***

*Review presented by Ron Fetzer PhD. Miami University*

Do you: play music as part of your training sessions? Use independent contractors, such as graphic designers, Web consultants, photographers, or copy editors? Copy cartoons from magazines to use as overheads? Download material from the Internet to use in presentations? Collaborate with other training professionals on projects? If so, you need to know the basic "dos" and "don'ts" of copyrights.

**(Continued on page 3)**

# Editor's Note

Hello colleagues,

I'm finally recouping from the piles of work and study found at my return from the national ASTD conference. This year's conference, by the way, was incredible. The only difficulty was selecting good presentations from a dazzling array of options for each slot. Please do consider joining us next year... if nothing else, just the ability to meet with people who share our interests and dreams, and the sheer energy of the place make it completely worthwhile. Now, I won't tell you that coming back to hundreds of emails is fun, 'cause it ain't... but oh well.. we've all been there.

As promised, here is "The Big One"! This newsletter issue includes articles on two competencies: Business Acumen and Needs Analysis. I hope you'll enjoy it! Here is what I've included for your continuing development and reading pleasure:

There are three articles on Business Acumen. The first is *Making training relevant to business, by* Michele Medved. Michele explains how to connect training to business needs by determining relevant business objectives *first*. The second article, *Human capital: An international perspective*, brings an international flavor to what we do! Donald Taylor writes us from the U.K. and offers an international perspective on discussions on human capital across Europe. The third article, *Selling the value of training*, was written by Bob Riess. Bob recommends that we work with people in our organizations who have nothing to do with training... and learn from them!

There are three articles on Needs Analysis (NA). The first is a "primer" on NA: *Analysis: The Study we do in order to figure out what to do*, by Allison Rosset and Kendra Sheldon. The authors give us a valuable overview of the topic, including a map that connects evaluation and analysis. Fred Nickols, our second author, also chose to summarize basic NA steps in his *Training Needs Analysis 101*, recommending that we take stock of the situation, customize our techniques accordingly, and recognize NA triggers. Finally, I chose to include Sandra Torres' *Proving the Value of Training* under the NA umbrella even though it's not strictly an NA article – it's probably a blend between NA and Business Acumen. Sandra wonders why we're constantly asked for ROI info and offers some insight on when training is *really* needed.

I hope to see you in our July 21 meeting! Have a wonderful summer and enjoy your barbecues, backyard mini (or big) pools, and whatever else means summer to you!

Cordially,

Cris Wildermuth

Cris "write me an article" Wildermuth
cris@diversityeffectiveness.com

# How to Submit an Article:

Would you like to offer a contribution to our *Professional Insight*? Great! Please follow these guidelines:

1. Check out the topic sequence included in the "welcome" section of this newsletter.
2. Submit your contributions to me (cris@diversityeffectiveness.com) by the first Friday of any month if you wish to be published on that month. This is particularly important if you would like to follow the "theme" of the month.
3. Limit your article to 300-600 words. Tip: There's no limit to how *small* your contribution may be!
4. Submit your article as a Word document, single spaced, Times Roman font size 12.
5. Include your name, email address, webpage, telephone number, and no more than one sentence saying something about you. An example could be *Jane Doe is a specialist in whatever and can be reached at email@emailsomewhere, www.webpagename.com, or at areacode-000-0000.*

The objective of our newsletter is professional development. If you would like to print a more commercial article, please consider purchasing advertising space).

*professional*
**INSIGHT**
is published monthly by the Western Ohio Chapter
American Society for Training & Development
140 East Monument Avenue, Dayton, OH 45402
937.224.8513
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# July Meeting

*(Continued from page 1)*

**Building Collaboration in #!*%#&*! Environments**

*Review presented by Cris Wildermuth, M.Ed. of the Diversity Effectiveness Group, LLC and WOCASTD VP of Communications*

In this session, the presenter provided practical and immediately useful skills for improving your ability to collaborate with others and how to build collaborative environments. A Hewlett Foundation/State of California pilot project reduced conflict by 67 percent in 94 organizations over three years by teaching these skills. This interactive session, identified and proved these five essential skills really work!

**Managers Win the Next Talent War: Love 'Em or Lose 'Em**

*Review presented by Pam McCallum, M.S.I.R., President of Leadership Resources, Inc.*

Think the late 90s were tough in terms of hanging on to talent? You ain't seen nothin' yet! Engaging and retaining workers at any age or any stage is largely up to managers. Indeed, managers will win (or lose) the next talent war. This presentation gave managers, and the HR professionals that support them, five tips for hanging on to older workers, while maintaining a firm grip on the generations that follow.

**Baby Boomerangers: Myths and Realities of the Future Workforce**

*Review presented by Pam McCallum, M.S.I.R., President of Leadership Resources, Inc.*

The Boomeranger effect, or the return of the retiree, is the natural consequence of the supply and demand phenomenon facing the modern workplace. In this session, the author of the recently published book The Gen-Xer Guide to Boomerangers, revealed the myths and realities of younger and older workers, provided strategies for effectively communicating with and managing this important group of workers to your advantage, and reviewed a case study of how one organization implemented online communications development, including testing, tracking and developmental resources.

**Crucial Confrontations: Never Walk Away From A Problem Again**

*Review presented by Victor Boccia, WOCASTD 2005 President, LexisNexis Customer Support Performance Improvement Consultant*

Behind the problems that routinely plague organizations and families, you'll find individuals who are either unwilling or unable to deal with failed promises. People break rules, miss deadlines, fail to live up to commitments, or just plain behave badly—and nobody steps up to address the issue. New research demonstrates that these disappointments aren't just irritating; they're costly—sapping organizational performance by 20–50 percent and accounting for up to 90 percent of divorces. Crucial Confrontations teaches skills drawn from 10,000 hours of real-life observations to increase confidence in facing tough issues. In this session participants learned to confront the problems that should be confronted. And, how to see the other person as a person rather than as a villain

Attendance is only $5.00 per person!!!
REGISTER ONLINE http://www.wocastd.org

## PRESIDENT'S CORNER

Dear Members,

Question: What does Rudy Giulanni have in common with, Ken Blanchard, Donald Kirkpatrick, Bob Pike, Dana Gaines Robinson, and Karl Albrecht.

Answer: (1) They are leaders in the training and development industry, and (2) they were all among the outstanding presenters at this year's ASTD International Conference in Orlando, Florida.

And what an incredible conference it was. Now I know you're thinking, "Well of course it was incredible Victor, after all you were in the heart of Florida's tourism "Mecca"." The truth of the matter though, is that while the location did have something to do with its success, the extraordinary line up presenters, educational sessions and guest speakers are what made this year so special.

Former New York City Mayor Rudy Giulianni set a very positive tone for the conference during his remarks at the opening general session and the conference stayed positive the entire week.

There is so much to be said about the conference that I cannot begin to tell you everything in this short column, so I want urge you to attend our July, "Breakfast Program" (that's right I said "breakfast") at Wright State University to learn more about it.  So please read about the program the "This Month's Program" segment of this newsletter.

If you're wondering why we're having a breakfast meeting, it's because when we polled our membership and held planning sessions last fall for 2005, there were numerous requests that we bring a "breakfast" meeting into our general program rotation.  Well we listened to your comments and suggestions and are thrilled to demonstrate our dedication to meeting your training and development needs.

And so we hope you'll join us bright and early, Thursday morning July 21, at Wright State University to learn more about the state of the Training & Development Industry and to learn about some of the top educational sessions conducted this year.

We hope to see you there!

Sincerely,
*Victor Boccia*, 2005 WOCASTD President

# Competencies of the Month

This month's competencies are Analyzing Needs & Proposing Solutions and Applying Business Acumen. Here are the definitions taken from the national ASTD webpage:

**Analyzing Needs and Proposing Solutions**
*Identifying and understanding business issues and client needs, problems, and opportunities; comparing data from different sources to draw conclusions; using effective approaches for choosing a course of action or developing appropriate solutions; taking action that is consistent with available facts, constraints, and probable consequences.*

**Key Actions**
**Gathers information about client needs**—Collects information to better understand client needs, issues, problems, and opportunities; reviews organizational information and human performance outcomes; studies organizational systems to better understand the factors affecting performance; integrates information from a variety of sources; asks internal and external partners for input and insight.

**Diagnoses learning and performance issues**—Uses research methods to isolate the causes of human learning and performance problems; proposes theories to understand and explain the factors affecting performance; detects trends, associations, and cause-effect relationships.

**Generates multiple alternatives**—Gathers information about best practices; thinks expansively and brainstorms multiple approaches; generates relevant options for addressing problems/opportunities and achieving desired outcomes; maintains a database or bank of possible solutions and their effectiveness.

**Searches for innovative solutions**—Challenges paradigms and looks for innovative alternatives; draws upon diverse sources for ideas and inspiration in creative problem-solving activities.

**Chooses appropriate solution(s)**—Formulates clear decision criteria; evaluates options by considering implications, risks, feasibility, and consequences on the client system and on other parts of the organization; prioritizes and chooses an effective option.

**Recognizes impact**—Considers the implications of learning and performance decisions, solutions, and strategies in other contexts; makes decisions using a broad range of knowledge that extends beyond the limitations of the organization and its immediate needs.

**Proposes solution(s)**—Recommends a plan or process for making changes; clearly explains rationale for the recommended solution and how it will address the performance gap or opportunity.

**Applying Business Acumen**
*Understanding the organization's business model and financial goals; utilizing economic, financial, and organizational data to build and document the business case for investing in workplace learning and performance solutions; using business terminology when communicating with others.*

**Driving Results**
*Identifying opportunities for improvement and setting well-defined goals related to learning and performance solutions; orchestrating efforts and measuring progress; striving to achieve goals and produce exceptional results.*

**Planning and Implementing Assignments**
*Developing action plans, obtaining resources, and completing assignments in a timely manner to ensure that workplace learning and performance goals are achieved.*

**Thinking Strategically**
*Understanding internal and external factors that impact learning and performance in organizations; keeping abreast of trends and anticipating opportunities to add value to the business; operating from a systems perspective in developing learning and performance strategies and building alignment with business strategies.*

## Surf's Up
### Website of the Month

This month's website is ... our very own www.astd.org! I'd like to invite you to take advantage of our great national website. If you are a national member, there are tons of articles and white papers you can take advantage of. Even if you aren't a national member *yet* J though, here are some gems you can find right on the front page:

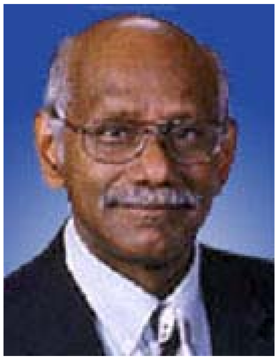
• Click on "ASTD 2005 Conference Daily" to read about what happened at each of the main conference days.

• Click on "Become a Certified Learning Professional in Learning & Performance" to learn about exciting developments in our field – a pilot certification program for performance improvement professionals!

• Scroll down and when you reach "This Month's Ask a Consulting Expert" check out a brief article on tips for partnering with your spouse... something many of us in the consulting field do.

Happy reading! If you find anything else that you like in the astd website, please do let me know, so that I can pass on the info to our colleagues!

# A Special Event Coming Soon!



We're super excited to announce a wonderful opportunity for our members: A **one-day workshop** with the trainer's trainer, Thiagi!

If you've never seen Thiagi in action, this is a must! I (Cris) have personally seen his presentations at the national ASTD conferences, and all I can say is ... I hope I become someone like him *when I grow up*! Thanks a million to our President Elect Scott Graham for his efforts on this one. **Mark your calendar now for Monday, September 26,** at the Student Union of Wright State University.

Here's a sneak preview of Thiagi's program: **Interactive Strategies for Improving Performance**

**Part 1: Designing Interactive Strategies**

The best way to improve your training is to encourage participants to interact with each other, with the content, and with you. In this workshop, Thiagi reveal five secrets of effective interactive training that is faster, cheaper, and better. You will begin by rapidly exploring 60 different training strategies. Later, you will master additional details of several strategies:

- Structured sharing that helps practitioners exchange their expertise with each other
- Interactive lectures that enable you to retain control of the session while participants interact with each other
- Textra games that transform your dull, dry handouts come alive
- Simulation games that use inexpensive materials and methods to reflect the realities of the workplace
- Jolts that last for a few minutes and provide powerful insights and concepts

With Thiagi's framegame approach, you will learn how to load existing templates to create your own games in a matter of minutes. You will also learn how to avoid irrelevant fluff and fun and immerse your participants in engaging activities.

**Part 2. Conducting Training Games and Activities**

Are you excited about training games and activities but anxious about losing control, wasting time, and being attacked by participants? Based on 20 years of field experience and research, Thiagi shares with you three important secrets of effective training facilitation:

- Identify seven critical dimensions of activities based training (including pace, intensity, competition, and playfulness). Learn how to select, maintain, and balance appropriate intensities of these dimensions.
- Recognize participants from hell and their disruptive behavior patterns. Learn strategies for discouraging such patterns and specific tactics for handling each pattern.

Identify the importance of the debriefing process for linking the training game or activity to the workplace reality. Learn a powerful six-phase model for maximizing learning from experience.


## Call for Volunteers!

We're looking for volunteers to help put together this fabulous program! Would you like to get involved? Please contact Scott Graham at (937) 775-4473 or Kristi Maxwell at (937) 604-9816.

## Help Us Grow Membership

Sign up a new WOC-ASTD member and receive a free lunch or dinner meeting! Bring a colleague to our next meeting. Membership information is available on our website (www.wocastd.org) or email Stan Adams at stan.adams@relizon.com.

We now accept Credit Cards!

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A friendly reminder from our VP of Membership and from all your colleagues at the WOC-ASTD... please don't forget to renew your membership! Our membership helps the chapter with the essential funding for great programs such as the upcoming Thiagi event. We can't do it without the support of all of us! You will find the renewal form and all necessary information at our website. You may go directly to http://wocastd.org/forms.htm. Questions? Please contact Stan Adams, our VP of Membership, at stanley.adams@relizon.com or at (937) 630-8704.

# BUSINESS ACUMEN

## Making Training Relevant to Business Objectives

*Michele B. Medved*

How would you answer the following question?

The key to a successful training department is:
a. The type of technologies included in training programs.
b. A good turnout at training sessions.
c. A service orientation to help an organization meet business objectives.

If you answered "c", you would be right according to industry experts. We training professionals provide a valuable service to organizations. Our role is to create learning opportunities that translate into results for a business.

This article will explain how to determine business objectives and create training that contributes to business results.

### Determining Business Objectives

*Interact with top management using a service approach*
To be successful as a service provider, open and maintain a dialog with your customers, the top leaders of the organization. Before meeting with top management, learn about the business objectives by reading company-related information on the Intranet and Internet, stockholders reports, market analysis, and press releases.

Instead of immediately telling top management what we can do, ask them for a list of their top performance objectives or concerns. It is useful to probe for further information by asking relevant, informed, and business-focused questions. Once you have an understanding of your customer's needs, explain or reinforce the critical link between learning and business results. If necessary, use supporting data or successful case studies to present your case.

When you interact with top management, you should:
• Advocate the inclusion of **training department representatives** on project teams.
• Set up a **communication system** between top management and training representatives to ensure that all curriculums remain true to business objectives.
• Identify **Subject Matter Experts (SMEs)** who will help the training department design, review or/and deliver training that meets business objectives.
• Determine the best way to **measure success** in terms of performance back on the job and business metrics (Levels 3 and 4 in the Kirkpatrick Method of Evaluation).

Adopting a service approach will help you win the trust of top management and their commitment to training programs.

*Align business and training goals*
Once you have an understanding of business objectives, align these objectives with the goals of the training department. You can do this at a mission statement level, as well as at a project level.

### Creating Training which is Relevant to Business Results

*Determine competencies*
A key question in linking training to business results is "what competencies will help meet the company's business objectives?" A competency-based approach can help drive the design, development, and evaluation of your training intervention.

Clearly defined competencies help employees determine their goals, monitor progress, and measure achievement. For example, at BMO Financial group, auditors complete a role specific competency assessment. The results are used to create customized learning programs, all of which are tied to capabilities to meet business objectives.

*Design relevant training*
To design a training program using competencies, involve Subject Matter Experts (SME's) in the identification of competencies, and design, delivery, or review of training. At Pfizer, for example, a group of senior administration assistants from across the company decide on the type of training administration assistants obtain. This group is also involved in the design of the training.

To design training which is relevant to business needs, use the following guidelines:
• State measurable outcomes that learners will be expected to transfer back to the job.
• Include only "need to know" information.
• Describe why the new competency or enhancement is necessary for on-the-job performance.
• Add a component for management to support employees in applying skills learned back on the job.

*Include core company knowledge in training*
In addition to job-related competencies, core company knowledge should be part of every employee's training curriculum. This knowledge should include the company's goals, description of core products or services, and how the company measures up against competitors.

***(Continued on page 7)***

For ideas on how to implement core company knowledge during new hire orientation, see **Beyond Sales Training: Company 101 for All Employees** in the ASTD Links April Issue.

*Evaluate the impact of training*

By assessing learners at various intervals, you ensure that they have transferred the competencies learned during training back to the job. For example at Sprint, employees are measured at 30, 60 and 90-day intervals using the same metrics as business customers.

While it is difficult to isolate the impact of training from other interventions, it is usually possible to link training interventions to organizational improvements. To help monitor the effect of training, use the metric defined at the outset by your customer. This metric may be hard (increased sales) or/and soft (improved teamwork).

In conclusion, adopting a service approach will:

• Helps you, the training professional, remain true to management's top priorities.

• Make the training department an integral part of business operations.

• Ensure that training is relevant to business objectives and contributes to business results.

*Michele B. Medved is an Instructional Design Consultant and the owner of MBM Training Services. She specializes in the design and development of competency-based learning programs and blended learning solutions. Michele has her Masters degree in Educational Technology and is a member of ASTD-Los Angeles. She can be contacted at mbmtraining@yahoo.com or www.mbmtraining.com.*

**References**

All case studies are quoted in Training Magazine, Top 100 Companies issue. Volume 22. Number 3. March 2005.

## Human Capital: An International Perspective

*Donald H. Taylor*

Human capital is the same the world over, surely? Logic dictates it must be – after all, people are the same, aren't we?

Certainly, but the attitude to human capital differs widely – particularly when it comes to what governments expect. Increasingly concerned by the extent of global competition, European governments want to raise employers' awareness of human capital. They also want a clear view of the extent of where their skills levels need boosting, and a sense of how to prioritise new offerings in state education systems. There are also concerns about the need to be widely inclusive in employment. Together, these two issues have generated a lot of talk about human capital, and a deal of legislation, too.

In Denmark, the Finance Ministry is half way through a ten-year plan to develop a methodology for reporting on intellectual capital accounts (these will include human capital and skills as integral parts). In the UK, the government now requires listed companies to produce an annual Operating and Financial Review (OFR), including human capital metrics.

In Germany and the Netherlands companies are required to report on human capital metrics to their workers' councils. France, too, already has a complex set of human capital metrics, with companies of more than 300 employees required to publish an annual social report including 100 human capital and social indicators. The Australian government publishes details on a wide range of human capital metrics, mainly focusing on equal opportunities and diversity.

Strangely, Sweden requires minimal reporting, even though it is often regarded as the home of human capital management (financial services company Skandia, one of the exemplars of human capital management, is based there). Yet only 5% of the contents of the average Swedish annual report are dedicated to human capital.

Meanwhile, the international quality standard, ISO 9001:2000, now has Resource Management as one of its five key features, and an essential element of that is – you guessed it – knowing the skills distribution among your workforce, and providing personal development plans for them all, another facet of human capital.

So there is a wide spread of legislation and regulation requiring firms to take human capital and its measurement seriously internationally. Of course, government-required human capital *metrics* are not necessarily those that indicate human capital *management* best practice. Mandatory metrics typically include measures of training allocations, staff turnover, diversity and absenteeism – yet high training may not increase productivity if the training is bad or mis-targeted, and low staff turnover is not always a good thing in all industries.

Internationally, then, human capital is very much on the agenda, and many governments are keen that it should be measured. While there is still little agreement as to what should be measured, and to what those measurements mean, the train has started, and we can expect these issues to be resolved in the coming years – and when this happens, it will likely be the foundation of an international standard that affects us all.

*Donald H Taylor is Alliances Director at InfoBasis Limited, a UK company specialising in skills management technologies and expertise. He can be reached at donaldt@infobasis.com or at the telephone +44 (0)20 8580 1901.*

# Selling the Value of Training

Bob Riess

Whether you are an internal training professional or an external training consultant, the key to selling the value of training is to start with really understanding what the people at the top levels of the organization need to help them achieve their business goals.

When I was an internal performance consultant, a top ranking person in the company said to me, “Bob, going to training is kind of like going to the dentist and it is just one of the necessary evils in life.” This person had never been to one of my programs, but I knew I needed to overcome his initial perception so that I would not be viewed as part of a “necessary evil” and show that I created real value for the organization.

My first jobs were in sales (becoming a sales trainer was how I started my career in training and development) and I now have my own training business. Yet it is still a real challenge to prove my value to the people that matter the most (the ones that sign the checks). My challenge to you is to figure out what matters the most to the people at the top and define your value. Do this so that the next time someone has an issue, they think of bringing you in to help solve their problem. After you have developed the reputation of being a problem solver, you will be seen as a business partner and will be invaluable to the organization.

I encourage you to take the following actions the next time you want to have a direct impact on the business:

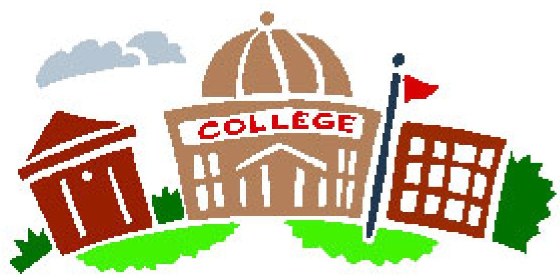
- Go to the highest ranking person in the organization that has nothing to do with Training and/or Human Resources and simply ask what they need from you to help them achieve their goals given the fact that you have experience in… (you have to complete the sentence). Note - If you can’t get to the highest ranking person, go as high as you can go.
- Be very receptive to what they are saying even if it does not fall directly into the area of training. Be honest with yourself and ask if what you are doing today is really more important than what the top people in the company want you to do.

In close to ten years of Training and Development experience, one of my most successful programs was the facilitation of a weekly conference call that promoted interaction between field sales and the home office staff. Although it was not really training, it was the one of the most successful programs because it was what the VP of Sales wanted. In addition, the President of the division could clearly see how this weekly conference call directly contributed to his division’s ability to meet an $11 million net operating income target.

In summary, the first step in selling the value of training is to understand what the people at the top really want, and then define what you bring to the table to help them achieve their business goals.

In my next article, I will discuss the next step in selling the value of training - how to communicate your impact.

Bob Riess is the President of Innovative Training Services, LLC and can be contacted through www.innovativetrainingservices.com or at (859) 240-2550.




# Announcing the ASTD Student Chapter!

We are proud to announce the first ASTD Student Chapter of the country, the result of the initiative of our VP of involvement, Kristi Maxwell, and the students of Wright State University. More information will be sent on this chapter in the next edition of Professional Insight.

# NEEDS ANALYSIS

## Analysis: The study we do in order to figure out what to do

*Allison Rossett & Kendra Sheldon*

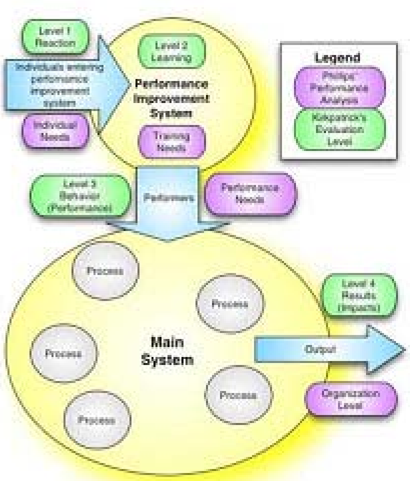
A performance analysis is generally called for when you want to improve a part of the organization (look for needs) or to fix a problem that someone has brought forth. Both are generally fixed in the same manner.

There are four *performance improvement needs*: Business, Job Performance, Training, and Individual (Phillips, 2002).

When performing an analysis, it is best to take a long term approach to ensure that the performance improvement initiative ties in with the organization's vision, mission, and values. This connects each need with a metric to ensure that it actually does what it is supposed to do. This is best accomplished by linking performance analysis needs with Kirkpatrick's *Four Levels of Evaluations* (Phillips, 2002):

- Business Needs are linked to Results or Impact (level 4)
- Job Performance Needs are linked to Behavior (level 3)
- Training Needs are linked to learning (level 2)
- Individual Needs are linked to Reaction (level 1)

By linking the analysis and evaluations models together, a total system concept is formed:



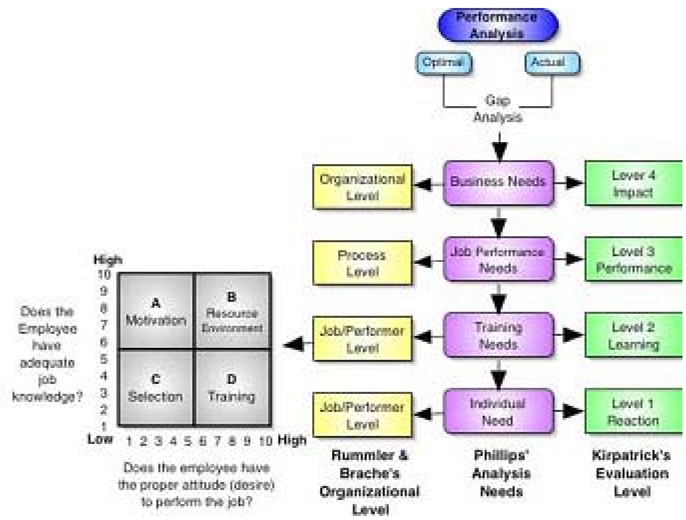

Analysis is performed to determine what is needed, thus it begins with a gap analysis: ***The "needs" of the organization minus the present performance level equals the gap.***

**Performance Improvement is a is a tool to bridge the performance *gap***

At this time, do not worry about how you are going to bridge the gap (creating content and context). Rather, the goal is to discover the present level of performance and the performance that is actually required. In addition, find out the "why." That is, what is causing the gap?

The Japanese have an interesting performance improvement concept — they ask "why" five times when confronted with a problem. By the time the fifth why is answered, they believe they have found the ultimate cause (root) of the problem. So when looking at a performance gap, look deep-"What exactly is causing the gap?"

Once you understand the problem (gap), then you need to see how it fits in with the various levels of the organization. The chart below shows the basic outline of a *Performance Analysis* and how Phillips' *Four Needs* and Kirkpatrick's *Four Levels of Evaluations* link in with Rummler & Brache's *Three Level Performance Framework*.




*Backwards planning* or more specifically, *backwards analysis*, should be used. That is, look at the broader goals of the organization and then work your way down to individual needs.

**Business Needs**

Investigate the problem or performance initiative and see how it supports the mission statement, leader's vision, and/or organizational goals, etc. Fixing a problem or making a process better is just as good as an ROI, if not better. Organizations that focus strictly on ROI are normally focusing on cost-cutting. And you can only cut costs so far before you start stripping out the core parts of a business. A much better approach is to improve a performance or process that supports a key organization goal, vision, or mission.

When senior executives were asked the most important training initiatives, 77% cited, "aligning learning strategies with business goals"; 75% cited, "ensuring learning content meets workforce requirements"; and 72%, "boosting productivity and agility" (Training Magazine, Oct 2004). Thus, senior leadership is not looking at training to be a profit center (that is what other business units are for), rather they are looking at performance improvement initiatives to help "grow" the organization so that it can reach its goals and perform its mission.

***(Continued on page 10)***

The goal is to make an impact or get some sort of result. So once you have identified the gap between present performance and the organization's goals and vision; create a level 4 evaluation (impact) that measures it — that is, what criteria must be met in order to show that the gap has actually been bridged?

To ensure you have accurately captured the **Business Needs**, the analysis must look at the needs of the Organizational Level and measure the Results or Impact.

**Job Performance Needs**

While the first analysis looked at business needs, this analysis looks at the job performance needs and these two needs could slightly differ. The first need, business, often has a slightly more visionary or future look to it, while the job performance need normally looks at what is needed now. Thus, business needs often tend to be more *developmental (the future)* in nature, while job performance needs are normally more related towards the *present*.

This is perhaps the most important need to look at as it links the performer with the organization. When analyzing job performance, you want to look at the entire spectrum that surrounds the job: processes, environment, actual performance verses need performance, etc, thus it often helps to divide the analysis into three groups: people, data, and things.

To ensure you have captured the **Job Performance Needs**, the analysis must look at the *Process Level* and measure the *Performance (Behavior)* of the job holders.

Some tools that should help are:
- Performance Gaps
- Analysis Information
- Jobs and Tasks
- Tasks
- Analysis Templates (RTF file)
- Various Approaches to Needs Analysis

After assessing the business and job performance needs, you should have a pretty good ideal of what needs to be fixed and future requirements. Analyze your findings and then start making plans for any needed performance interventions, such as training and development, job aids, coaching and mentor programs, process improvement, etc.

**Training Needs**

While Phillips named this part of the analysis *Training Needs*, a better term might have been *Performance Intervention Need*. That is, you need to think beyond training, and determine what type of performance intervention will actually bridge the performance gap.

As you assess the performance for any needed interventions, look at the Job/Performer requirements, that is, what the performer needs to know in order for the performance intervention to be successful. In addition, look at how you are going to evaluate any learning requirements (level 2). It is one thing to determine the learning needs (skill, knowledge, & self system [attitude, metacognition, etc.]), but it is quite another thing to ensure that those requirements actually take place.

**Individual Needs**

The *Individual Needs Analysis* is the identification of the target population. While this is closely related to the Training Need above, in that they both look at the Job/Performer Level, Individual needs go a little bit deeper. It ensures that the performance intervention actually conforms to the individual requirements. For example, in the Training Needs analysis, it might be determined that the job holders need to learn a new process. In this need analysis, the target population is looked at more closely to determine the actual content, context, and delivery method of the performance intervention.

In the Training Needs analysis, you look at learners as whole, while in this need analysis you look at them as individually as possible to determine Job/Performer levels. In addition, you want to determine how well this analysis was carried out by using a level one evaluation — Reaction. Throughout the training industry this evaluation is also known as smiley sheets — how well did the learners like the performance intervention. This is entirely the **wrong** thing to measure as it does not matter if the learners like it or not. What matters the most is, "does it actually help them to improve their performance?" Thus, it needs to go beyond smiley sheets and actually measure their self-system.

**Putting It All Together**

The whole ideal behind this concept is to look at the system, identify a need, build an evaluation (measurement instrument) that identifies the objective that is required, identify the "why", select the intervention, and then build content and context that will bridge the gap between the need and the objective. Once you have a program in place, performing an evaluation should be a snap because you already have the measurement tools in place.

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# Training Needs Assessment 101

*Fred Nickols*

### TNA As A Configurable Process

The first and most important thing to know about Training Needs Assessment (TNA) is that it is a process that must be configured to meet the situation at hand. For one thing, TNA can be triggered by several different circumstances, each of which poses its own goals and requirements. For another, TNA is an information-based, analytical activity and several means of collecting and analyzing information might be used (e.g., surveys, questionnaires, focus groups, interviews, observations, data collection and analyses), not all of which are appropriate in all situations. So, when it comes to TNA, you have to take stock of the situation facing you and devise an approach that fits that situation.

### TNA As A System

As a system, TNA is marked by inputs and the conversion or transformation of those inputs into outputs. The primary output or product of a TNA consists of recommendations and rationales for those recommendations. The recommendations pertain to training and the rationales justify pursuing training – or not, as the case may be. A TNA doesn't always lead to training; sometimes its conclusions are that training is not needed and/or that some other course of action is more appropriate (e.g., job aids, improved measurement and feedback, goal clarification and even job or work redesign). The inputs to TNA are informational and vary with the occasion. These are reflected in what triggers the TNA.

### TNA Triggers

A TNA can be triggered for several reasons, chief among which is that someone has decided that training is the solution to a problem. This often surfaces as a request for training. In such cases, the focus of the TNA is to clearly identify the problem to be solved and to confirm or disconfirm the relevance of training.

A TNA can also be triggered in the case of mandated training (e.g., safety training required by law, harassment training in the aftermath of a lawsuit, and the maintenance of professional credentials and licenses). In these cases, the aim of the TNA is one of ensuring that whatever training is provided (a) satisfies the mandate and (b) contributes to improved performance. This holds true whether the mandate comes from external or internal sources.

A TNA is also germane to situations in which the requirement for training seems obvious (e.g., new hires with little or no work experience, the installation of new systems and processes, and technological changes). Even here, the goal of a TNA is to determine the requirements to be satisfied and confirm or disconfirm the relevance and utility of training. And, even here, training might not be the answer. In the last analysis, training serves to remedy skill and knowledge gaps. Consequently, its effectiveness relies on learning and learning can occur and be facilitated via means other than training (e.g., job aids, self-instructional materials, coaching and mentoring to name a few).

### TNA and Gap Analysis

Those who write about TNA assert that it is essentially a gap analysis, a look at current conditions and at required conditions, with the further aim of determining how training might (or might not) close any gaps. Sometimes the gaps are couched in terms of organizational performance, sometimes in terms of individual performance, and sometimes in terms of skill and knowledge. Conducting such an analysis requires specifying the required conditions, determining the current conditions, identifying any gaps and then analyzing those gaps to confirm or disconfirm the links between organizational or individual performance and individual skill or knowledge of the kind addressable by training. That is a skill and process all its own. It can also be a time-consuming, labor-intensive and thus costly activity. It's probably a good idea to avoid proposing a formal, rigorous gap analysis as part of your TNA if (a) it's not relevant or (b) its costs outweigh those of the problem or the training being considered.

### TNA and Context

A TNA is typically conducted by a training specialist or a performance analyst, perhaps someone on staff or perhaps an outside consultant. This might be in response to a request for training or as part of some larger initiative. In either case, there is a larger context, a "big picture" if you will. First, the training department has its own survival requirements to look after and being viewed as "responsive" is often a key factor in that. Second, all organizations are social systems and politics is a factor in everything. Your choices are simple: play the game or sit on the sidelines – but, never use TNA purely for political advantage. If you do, you run the risk of destroying the utility and credibility of an oftentimes important tool. And, when you're contemplating a TNA as part of a major initiative, don't let TNA get positioned as an obstacle, as a drag on progress. Remember: TNA is an adaptable tool, not a lock-step procedure.

### Conclusion

TNA is a useful tool but it is a tool that must be adapted for the task and conditions at hand. As a consequence, it might be a sizable effort all its own or it might turn out to be much more modest, maybe even "quick and dirty." TNA can involve one set of activities and resources on one occasion and a very different set of activities and resources on another. However, the ends remain the same: recommendations and accompanying rationales regarding training – to make use of it or to pursue some other course of action. And, no matter the approach you take to TNA, two criteria must be satisfied: whatever you do had better be viewed as sensible and defensible in the context and the culture where you are working.

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# Proving The Value of Training

*Sandra Torres*

Do you think that anyone ever asked Aristotle and Albert Einstein to produce an ROI report on the value of their teachings? Somehow it doesn't seem likely. But then, Aristotle and Einstein weren't operating in Corporate America, where EVERYTHING eventually comes down to a matter of ROI.

Alas, we are required to prove the value of what we do in order to keep getting the funding that allows us to do it. While it should be "a given" that time spent learning and practicing a new skill is a worthwhile endeavor, our financial partners need to see some hard evidence in order to become believers. So we live in a world where we either justify our existence or perish!

Why does this issue of proving the value of training continue to surface? There are quite a number of reasons why people question the value of training. Let's start with the most obvious reason; training is not manufacturing or selling. At the end of the training day you can't count the number of widgets trainees have produced or the revenue they've generated in sales. So for those who measure value in terms of widgets produced or revenue generated (and there are many who do), training has produced nothing of value.

Sometimes, we create our own dilemma by failing to measure the impact our training has made beyond the "smile sheet." We get so caught up in finding "just the right course" and delivering it in "just the right way" that we forget about checking back to see if the impact of the course carries over into the workplace. So we end up with a lot of data that says trainees had fun and liked the facilitator (useful information for the facilitator), but we have no real evidence that we've had an impact on the bottom line (useful information for those who fund our work).

There is another reason why so many people have questions about the value of training. This reason is a simple one, but it's quite frequently overlooked by clients and even by training staff. Often training is the wrong tool for the job. We've seen it over and over again throughout out own careers. Something is not working the way it should, so someone requests training to fix it. We are asked to apply a "band-aid" to stop the bleeding, and we do so because we are there to help, or the person making the request is powerful and we don't want to upset the applecart, or they just happen to be asking for a course that seems like an interesting and exciting project to take on. And although we do our job well, and we produce a successful training experience, we have still used the wrong tool for the job, or we've applied the right tool to the wrong problem, and the training investment has little measurable impact. So how do we fix this? Ask yourself these three questions:

1. How is it decided that training is needed, and once it is decided, how is the training content selected?
2. How do participants end up in your training sessions?
3. What happens to trainees after they leave the session?

The answer to these three questions will tell you what to change in order to make sure that you are able to measure positive results from your training sessions. Here are some things to keep in mind as you go.

**Rule #1: Training Is Only The Right Tool When "they don't know how"**

Training cannot fix lack of desire, it can't fix systems issues, it can't get people the right tools or equipment needed to make them more productive, and it can't turn problem employees into model employees. Training can only teach people how to do something and allow them to practice and get better at something.

**Rule #2: Most People Don't Know About Rule Number 1**

That's right, training has been misapplied so often and for so long that most people don't realize that you can only do two things through the use of training: Teach people how and allow them to practice and get better.

For years trainers have attempted to do what is equivalent to cutting down a maple tree with a teaspoon. They've tried to fix major problems in the organization by training employees. But training can only fix the problem when training is the right tool to use for the job.

So when you plan to develop and implement your next training course, get together with the line managers, the operations folks, and a sample from your target audience. Ask questions about what is happening and what should be happening. If you find that learning how to do the job or having an opportunity to practice a skill will help to solve the problem or will solve the problem completely, your training can be set up so that it produces the desired result……adding value to the bottom line. If you provide training in situations where training is the right tool for the job, you will not struggle to prove the value training. Just be sure to plan the appropriate pre and post training measurements so you can document the results of your effort.

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# WOC-ASTD Position Referral Service

The Western Ohio Chapter of the ASTD provides its members with a continuously updated list of job openings in our area using Yahoo!'s Discussion Group technology.

For information, members can visit the WOC-ASTD Position Referral webpage at http://wocastd.org/members/positions.

To use this service, we ask that you be a member of WOC-ASTD. You will then need to sign up as a member of the Yahoo group.

You may elect to learn about new postings in one of three ways. You may:

1. Receive an e-mail notification of each new posting or
2. Receive a daily digest of each day's postings or
3. Suppress e-mail notification and view new postings by using your Web browser to view the group message board at your convenience.

If you are a new subscriber and would prefer to get fewer email messages, we recommend that you choose option #2. By setting your profile to the EMAIL DIGEST you will receive one email per day, yet you will not miss any postings. Digests usually arrive for morning review, listing the previous days postings.

To sign up for the group or to view new messages if you are already a member, use the internet link below for the WOC Position Referral Message Board:
http://groups.yahoo.com/group/WOCASTD PositionReferral

For complete information on how to use our system, please download the PowerPoint Instructions for "Using Yahoo Groups" (.ppt; 1,731 KB) prepared by Cris Wildermuth.

If you have any questions or suggestions about this system, please contact Steve Blatt (sblatt@udayton.edu).

| Month | Foundation Competency |
|---|---|
| January | Building Trust |
| February | Communicating Effectively |
| March | Influencing Shareholders |
| April | Leveraging Diversity |
| May | Networking & Partnering |
| June | Analyzing Needs |
| July | Applying Business Acumen |
| August | Driving Results |
| September | Planning & Implementing Assignments |
| October | Thinking Strategically |
| November | Demonstrating Adaptability |
| December | Modeling Personal Development |

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# Reflections on ASTD ICE 2005

*Pam McCallum*

As a frequent attendee at ASTD's ICE (International Conference & Exposition), I always enjoy the opportunity to broaden my perspective by participating in this major annual learning event. If you've never attended this Conference, you definitely need to consider taking advantage of the opportunity next year!

This year's ASTD ICE was held in Orlando, Florida during the first week in June and attracted over 8500 attendees representing a large variety of countries and cultures. The massive Orange County Convention Center served as the Conference venue hosting pre-conference workshops, general sessions, concurrent sessions, receptions and activities, the Conference EXPO, and lunches in the EXPO Hall on two consecutive days. The Conference Celebration featured a New York street party at Universal Studios including a variety of food, three attractions (Shrek 4-D, Twister - Ride It Out, and Revenge of the Mummy), and dancing.

ASTD ICE always showcases several top-notch speakers in General Sessions, and this year's presenters were especially interesting. Robert Knowling Jr., CEO of the NYC Leadership Academy shared his wisdom on "Transformational Leadership in the Midst of Change" in the first General Session. He highlighted his learnings about change from his work with the New York City Public School System as well as through his former roles with Ameritech and Qwest.

The second General Session showcased Rudy Giuliani (one of my personal heroes) speaking on "Principles of Leadership". His principles include developing a strong belief system, demonstrating courage, being an optimist, preparing relentlessly, communicating directly, and surrounding yourself with great people. His best-selling book, **Leadership**, provides his insights on these principles through examples from his remarkable career. I was especially impressed with his humility during his presentation.

The final General Session featured Steve Uzzell, an award-winning photographer (formerly with *National Geographic*), who shared his thoughts on "Open Roads, Open Minds". He used his photographs to illustrate his approach to problem-solving and creativity. Initially, when reviewing the Conference Program Guide, I contemplated skipping this General Session since it was held at the conclusion of the Conference, but I changed my mind and I'm so glad I did. Steve Uzzell offered many valuable reflections on life in general, and his presentation provided a very inspiring conclusion to the Conference.

The Conference also offers a multitude of concurrent sessions on a wide variety of topics. I attended sessions featuring well-known thought leaders such as Edward DeBono, Ken Blanchard, and Ann Herrmann-Nehdi as well as practitioners in our field who offered many valuable insights along with tips and techniques.

During the Conference, I met new and interesting people through networking, reconnected with friends and colleagues, expanded my learning by attending numerous concurrent sessions, checked out new products at the ASTD EXPO, and spent time with one of my best friends, a successful consultant from Philadelphia. I returned from the Conference inspired and energized. For my money, ASTD ICE represents a very worthwhile investment.

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