

## Making Training and Education Part of Organization Transition and Design

In the article, *Integrating Organization Transition with Organization Design*, it was discussed how important it is that the organization transition takes input from the organization design. It is equally critical that the education and training efforts are based on the outputs from the organization transition and organization design. As part of the stakeholder analysis, developed in the organization transition process, the stakeholders impacts are identified and integrated with the education and training analysis. The training and education program requires role-based training and education for each stakeholder. This article will discuss how to develop a successful training and education strategy that leverages the organization transition and the organization design programs.

A challenge for many organizations is the ability to effectively plan, develop and deploy effective education and training programs. During business transformations, the education and training programs are not successful because employees are not properly prepared prior to the education and training, the employees attend training that do not meet their needs, or the means of delivering the content was inappropriate for the audience and the content. For a successful transformation, it is crucial that the training and education strategy is integrated with a comprehensive change program. One important element of the change program is that the stakeholders must be properly prepared before they enter any classroom or start any self paced or web-based training program.

The best way to accomplish this preparation is during the change management process. This can be carried out by ensuring that the education and training strategy leverages the completed work products from the change activities. By doing this, the education and training strategy will be based on the work completed in the stakeholder analysis during stakeholder management, the development of role definitions from the organization design, and effective change/training methods identified in the organization readiness survey and analysis.

The overall objective of the training and education strategy is to make certain that the stakeholders have the skills to effectively perform their daily job tasks both during the transformation and beyond the “go-live”. The education and training program is most effective when it includes awareness of the “big picture” of the process, focuses on the specific changes of the transformation, defines the details of specific processes and transactions, and delivers role-based training with hands-on experience or a simulated environment.

To develop an effective education and training strategy, the Who, What, When, How, Where and Why questions, shown below, need to be answered.

<b>Who</b>	Define the audiences from the stakeholder analysis.
<b>What</b>	Define the content based on the changing business processes, transactions, and activities.
<b>When</b>	Determine at what stage the education and training must be conducted to ensure proper knowledge transfer and retention.
<b>How</b>	Define the method(s) of delivery for the training. For example should the training be instructor led, web-based training, virtual classroom, simulations, or some combination.
<b>Where</b>	Define where the training will be conducted - in a classroom, virtually, or through web-based training. Additionally, define the logistical requirements for training, such as location, PC requirements, and other logistical needs.
<b>Why</b>	Define the rationale for the training and highlight the direct business benefits that will be realized as a result of the training.

Below is a detailed explanation of the process for the conducting the Who, What, When, How, Where, Why analysis:

**Step 1 – Define the Audience.** The stakeholder analysis in the change process identifies the audiences. However, the training audience analysis must go deeper than the stakeholder analysis in order to identify more characteristics of the audience, including the number of attendees at each location, the trainees prerequisite skills, any language or literacy issues, as well as other characteristics. One of the more critical components of the audience analysis is to define how each group learns best. This will help to determine the best training approach that will be the most effective. In addition, the change impacts for each stakeholder that were determined in stakeholder management analysis, will assist in identifying additional training or prerequisites for each stakeholder group.

**Step 2 – Define the Content.** Based on the business transformation, there may be changes to technology, business processes or policies. Regardless of the type of change, content will be required to educate and train the stakeholder groups. For instance, in a technology change the trainees may need to know how to use a new application and new business process accompanying the application. If this is the case, the content will need to be analyzed and broken into small “chunks” to be able to link each stakeholder group, as well as to help in the design and development of the training program. Also, by breaking the content into smaller parts, it will provide the stakeholders with the right amount of information at the right time. The challenge is to be able to gather all of the required content from the subject matter experts. But once the content is gathered from the experts and the content is broken into small segments, it will be easier for the subject matter experts to review and add input into the content. This optimal content will help to ensure a successful training program.

**Step 3 – Determine the timing for the deployment of the education and training program.** Not only is it vital that the deployment of the education and training be close to the implementation of the changes, but it is also essential that the training is staggered in such a way that it is not all “dumped” on the end user in the last week. It is more effective if learning is a progressive process by first laying a foundation then adding complexity as the learner progresses. It has been proven that a learner can only absorb so much information at a time. Therefore a phased and repetitive education and training program will ensure the stakeholders are learning and applying what is learned, before the user moves on to the next learning activity.

**Step 4- Determine the method of delivery.** This can be the most challenging step. The internet has made it easier to develop and deploy training globally without anyone getting on a plane or sitting in a classroom. Both web-based training and virtual classrooms are very cost effective. However, sometimes these methods of training are deployed to reduce cost, without analyzing to full impact to determine if either of these methods is effective and efficient for conducting training. As mentioned in the audience analysis, each audience learns best through different methods. It is essential that the delivery method takes into account the audiences’ ability to learn through a specific method, the complexity of the content and other resource constraints. By implementing a cost effective training method, without knowing the audience or the capability of the organization, the training program may turn out to be more costly in the long run.

**Step 5 – Determine location of the training.** This step focuses on the training infrastructure required to deploy the training program. Deployment includes classrooms, internet access, a learning management system, PCs, as well as other infrastructure criteria. The audience location, content of materials, the delivery methodology and the timing, will determine the learning infrastructure requirements. Web-based training content needs to be easily delivered over the organizations network as well as provide the users the ability to take the training course on their desktops. For virtual classroom training, it is necessary that the appropriate bandwidth is available to deliver voice over IP with the content. For instructor led training adequate classroom space, PC, projectors, printers, as well as other any equipment are key infrastructure requirements.

**Step 6 – Define the Benefits.** Training programs can be costly, so in addition to the cost of training, executives will want to know what benefits will be realized in return. As part of the process for defining the benefits, it is essential that there is an explanation for the rationale of the training program. What are the goals and objectives of the training program? What are the benefits the business will realize from the training program? How will the effectiveness of the program be measured? If the delivery method is web-based or virtual, will there be savings from travel and employee time away from the job?

As demonstrated above, the training strategy is the foundation of the education and training program. The strategy is the first step in the building block of the training program and sets the blueprint for the training design, development and delivery of the program. With each successive step, more information will surface about the audience, content, and delivery process. That is why it is important that the training program is an iterative process, and that the training strategy is part of the overall change program.

In summary, the objective of the training strategy is to ensure that the stakeholders have the skills they need to effectively perform daily job tasks within the transformation, and without hindering the perceived benefits of the transformation. To ensure each stakeholder is prepared for the business transition the following must take place: each impacted stakeholder needs to be identified (who); content for the training program needs to be developed (what); the appropriate timing of the delivery is required (when); the method for delivery needs to match the audience and the organizations capability (how); training delivery logistics need to be identified and ready to deliver the training based on the appropriate method (where); and defining the benefits and rational for the training program to gain management and executive sponsorship (why).

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