




The Learning Environment

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BUILDING A LEARNING ORGANIZATION

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Introduction

THE LEARNING ORGANIZATION

Peter Senge, in his book, *The Fifth Discipline*, helped popularize the term, "Learning Organization". Many organizations have used this concept to help the people in their organization recognize the need for continued learning in a business environment where intellectual capital can provide a significant competitive edge. David Garvin, of the Harvard Business School, defines a Learning Organization as:

“an organization skilled at creating, acquiring and transferring knowledge, and at modifying its behavior to reflect new knowledge and insight.”

Characteristics of a Learning Organization. Some of the more common characteristics found in a successful learning organization include the following:

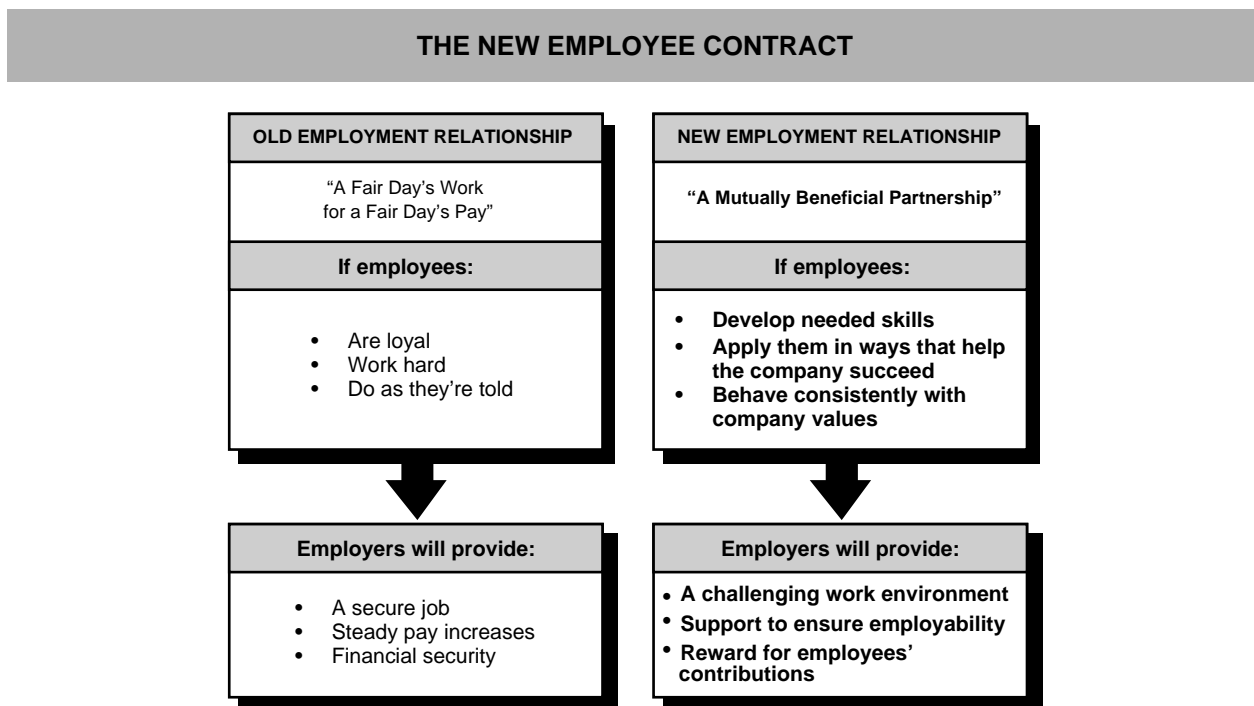
- **Strategic.** Management directed training philosophy and priorities.
- **Job-Specific.** Job-specific, competency based curriculum.
- **Kaizan.** Commitment to continuous improvement and systematic problem solving.
- **Knowledge Transfer.** Ability to transfer knowledge quickly and efficiently (includes leveraging technology).
- **Learn From Experience.** Ability to learn from own experiences, past history, and other's experience.
- **Reinforcement.** Constant reinforcement through communication and education.
- **Investment.** Pre-determined investment level for training (dollars and hours)
- **Measurement.** Ability to measure training effectiveness (performance improvement).

The Learning Environment. The concept of the Learning Environment is both a training philosophy and process. The concept provides a focal point for continuous learning and a systematic vehicle for change. It is more than a place, a catalogue, a multifaceted set of programs, or a team of facilitators and network trainers. The concept of the Learning Environment is a commitment to provide the resources necessary for each employee to develop the skills, knowledge, and competencies needed to be successful in their current jobs and to continually adapt to future job requirements.

The concept of the Learning Environment is a way of streamlining and systematizing the organizational education effort. The emphasis is on promoting a spirit of continuous lifelong learning for the organization and the individual.

THE LEARNING ENVIRONMENT AND THE NEW EMPLOYEE CONTRACT

The Learning Environment can help the organization meet the new employee contract. As business conditions change, the relationship between employers and employees is evolving and presents us with new opportunities. One way to look at the employer-employee relationship or “employee contract” is as follows:



This change in relationship is reflected in a changing work environment, structure and process, roles, leadership models, and management practices that continually encourage autonomy. Building sound expectations between the organization and its employees will yield greater levels of productivity and employee satisfaction — leading, in turn, to greater customer satisfaction.

Changing Work Environment. Organizations are moving toward flattening corporate hierarchies, broader roles for workers and managers, a more culturally diverse labor force, and a greater use of technology to increase productivity and speed. To adapt to the changes, an organization must rapidly create new processes, workplaces, and job descriptions and people who are prepared for the future.

Changing Structure and Processes. The structure and processes of organizations are changing at an accelerating rate. The rigid structure and clear chains of command of the traditional hierarchical organization, with the “thinkers” at the top of the pyramid and the “doers” at the base, cannot meet the requirements of speed, simplicity, efficiency, quality and service essential to a dynamic, sales and service-driven organization. These organizations emphasize effective processes and often structure themselves as entrepreneurial teams working with other teams to create value and profit. Fewer boundaries, more ambiguity, more rapid communication between suppliers, customers, and people within the organization change the roles that people play in the organization.

Changing Roles. Individual roles must change to meet the new demands. Employees are required to take on more responsibility. In addition to performing the technical aspects of their jobs, employees must know how to access information immediately. Employees must be able to perform more varied roles than in the past, drawing on a broader set of skills such as problem solving and team effectiveness. Each employee must grow and develop, learn new skills, new knowledge, and new behaviors to adjust rapidly to new challenges.

Changing Leadership Models. Many organizations are building a new model of leadership, involving:

- **Managers** who take full responsibility for hiring, developing, engaging, and rewarding a dynamic and talented workforce, and who actively solicit feedback on their own performance.
- **Teams** that work effectively across boundaries and are empowered to make key business decisions that satisfy customers.
- **Individuals** who take responsibility for equipping themselves with the resources and competencies that will make themselves and the business successful.

Continuous Learning. Individuals who flourish will be those who make a commitment to continuously learn new skills, knowledge, and competencies. Organizations must be committed to these individuals and to devising ways to integrate learning into everyone's daily job. Many organizations are taking a proactive role in building a culture of "continuous learning" within the organization through new human resource and training programs.

Self-Management. The development of specific competencies becomes important for job placement and career advancement. The principle of self-management and a personal responsibility for development becomes essential.

Employees will need to have the capability to proactively manage their own development and career. Each individual will need to be able to identify the skills and knowledge needed to meet the needs of the organization, the requirements of their current and future jobs, and the demands of their own goals. They then need to be able to manage the use of available resources to obtain the competencies requires.

MOVING TOWARD A LEARNING ENVIRONMENT

In order to move forward with the vision of the learning organization, an organization must consider intellectual capital to be a key corporate asset and competitive edge and initiate steps to become a learning organization. The organization should:

1. Have a strategy and structure which focuses on continual change, business process efficiency, and a high level of customer service.
2. Utilize training as a resource to support transformation of the organization, enhance competencies to meet organization-wide demands, and enhance competencies to meet business specific training needs in a “just-in-time” manner.

OVERVIEW

This paper outlines the approach of the Learning Environment, the structure and process for managing the learning environment, the design of the curriculum and coordination in building the curriculum.

The Approach of the Learning Environment. In this section we discuss six key principles of the approach of the Learning Environment. The approach is strategic, self-managed, integrated, continuous, uses multiple channels and addresses an expanded audience.

Managing the Learning Environment. In this section we discuss the structure and process for managing the learning environment. We discuss the expanded role of HR and Training. We also consider the learning environment integrated database and its multiple uses.

Designing the Learning Environment Curriculum. In this section we discuss the Learning Environment Model and the way it help to define sources and locations of learning. We also discuss curriculum scope and content.

Building the Learning Environment Curriculum. In this section we discuss various components of the curriculum, possible resources and criteria for curriculum programs.

Appendix A: Personal Learning Planner. This section provides a sample PLP.

Learning Environment Approach

*“A Tool for the Learning
Organization”*

THE LEARNING ENVIRONMENT

The idea of the Learning Environment is a training philosophy and process. It provides a focal point for continuous learning a systematic vehicle for change. It is more than a place, a catalogue, a multifaceted set of programs, or a team of facilitators and network trainers. The Learning Environment is a commitment to provide the resources necessary for each employee to develop the skills, knowledge, and competencies needed to be successful in their current jobs and to continually adapt to future job requirements.

LEARNING ENVIRONMENT APPROACH

The concept of the Learning Environment is a way of streamlining and systematizing the corporate education effort. The emphasis is on promoting a spirit of continuous lifelong learning for the organization and the individual.

Six key principles seem to be apparent in successful corporate universities. These principles can help evaluate and shape training programs.

LEARNING ENVIRONMENT APPROACH

1. **Strategic** — Implement Strategy Through Training
2. **Self-Managed** — Emphasis on Self-Managed Development
3. **Integrated** — Integrated Curriculum
4. **Continuous** — Continuous Learning Process
5. **Multiple Channels** — Multiple Learning Opportunities and Action Learning
6. **Expanded Audience** — Expanded Target Audience

1. **Strategic.** Link training to the strategic needs of the organization and use training as one key vehicle to implement the strategy.
2. **Self-Managed.** Employees must take responsibility for their own development. Organizations should provide the information, programs, and opportunities for all employees to manage their own development plans.
3. **Integrated Curriculum.** Design the curriculum to assist an individual to grow at various points in their career. Assist them to integrate all their learning.
4. **Continuous Learning Process.** Implement the concept of self-development and continuous training as a process, rather than a specific place where training, may occur.
5. **Multiple Channels.** Relate training to on-the-job applications and, whenever possible, learn from the job itself.

- 6. Expanded Target Audience.** Consider various audiences within and outside the organization.

TRAINING TEAM

The training team can help all individuals develop the core competencies they need in order to talk, act, and behave in new ways. The Learning Environment can provide training in the knowledge and skills needed to be a successful learning organization. It can use and model the principles of a learning organization while it teaches them through a combination of core programs, Just-in-Time Offerings, Action Learning opportunities, and professional and technical programs.

TRAINING TEAM
<p>TRAINING ADMINISTRATORS</p> <ul style="list-style-type: none">• Centralized Materials Resource• Centralized Certification• Centralized HR Database• Centralized Implementation
<p>LEARNING AND DEVELOPMENT COORDINATORS</p> <ul style="list-style-type: none">• Business Unit Materials• Business Unit Learning Implementation
<p>LEADER/COACHES</p> <ul style="list-style-type: none">• Business Unit Leaders• Business Unit Implementation
<p>PEER COACHES</p> <ul style="list-style-type: none">• Business Unit Specialists• Business Unit Technical Implementation

Training Administrators. Training Administrators have a centralized function. They assist in the integration and development of materials. They provide a centralized source for certification and maintenance of the centralized HR database.

Learning and Development Coordinators. LDC's are focused on the design, development and modification of business unit specific materials. They also coordinate and implement learning within the business unit.

Leader/Coaches. L/C's are typically business unit leaders who have been certified as Leader/Coaches and can be called upon to deliver a wide variety of learning using Leader/Coach tools and techniques.

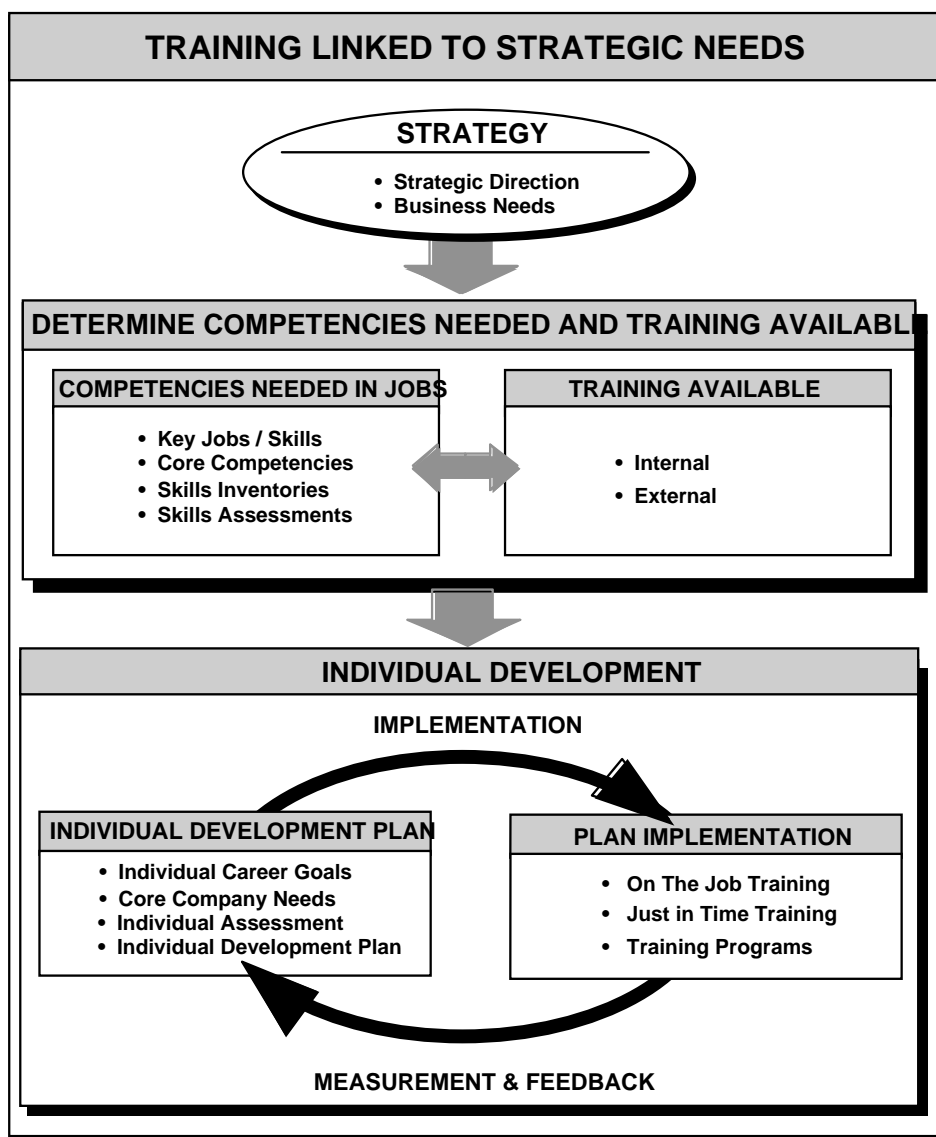
Peer Coaches. P/C's are typically business unit specialists who have acquired some area of expertise in a specific technical area. They often work in cooperation with the TA's, LDC's, and L/C's to provide learning in specific technical areas.

STRATEGY IMPLEMENTATION

To be effective, training must be linked to an organization's strategic needs. Many organizations are identifying the competencies needed for each job category and then developing a training and development plan for each employee linked to these competencies and the organizational strategy.

The strategy and business needs determine new processes and roles. These new roles demand new jobs with additional skill sets and core competencies. Organizations should develop skills inventories and skills assessments to analyze the processes and roles. Out of their analysis, they create curriculum plans for organizational-wide and business unit needs. Individuals can then create individual development plans that reflect the needs of the organization and their own career management. These are then implemented and tracked.

The chart below outlines the process:



SELF-MANAGED — EMPHASIS ON SELF-MANAGEMENT DEVELOPMENT

The principle of self management in personal development becomes critical as the concept of lifetime employment is replaced by the principle of lifetime learning, and the development of specific core competencies become mandatory for job placement and career advancement.

Employees need to have the ability to proactively manage their own development and career. Each individual needs to be able to identify the skills and knowledge needed to meet the needs of the organization, the requirements of their current and future job, and the demands of their own goals. They also need to be able to manage the use of developmental resources.

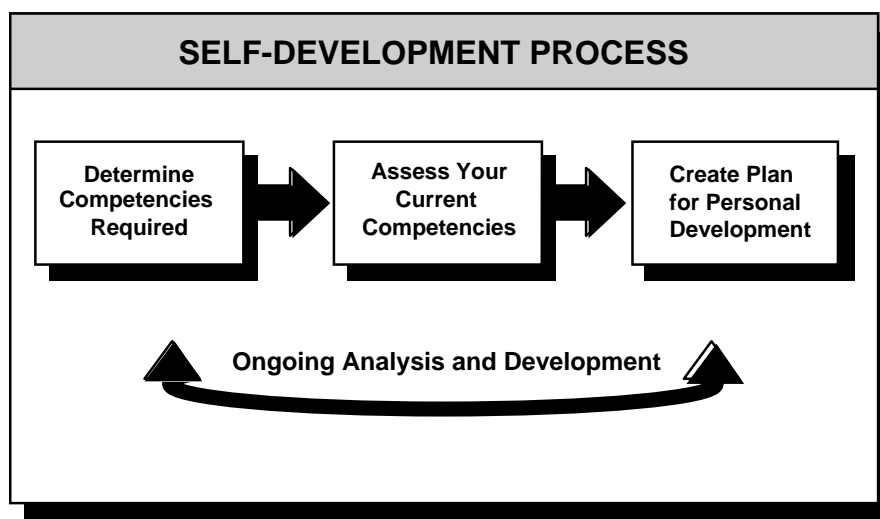
Self-management means that training resources must be easily accessible and user friendly. They need to be designed to allow each individual to perform periodic competency self assessments; match competencies, personal goals and organizational requirements; determine personal gaps; and develop and implement plans to upgrade their own knowledge and skills.

Employees should be required to take responsibility for their own skill development. They need to have specific resources available to them to select training curriculum. The resources should include self-paced training, outside courses, seminars, offerings for group sessions, take-home video and audio programs, etc.

SELF-DEVELOPMENT PROCESS

Every individual should make a commitment to their own personal growth and development. Each individual will need to be able to determine the competencies needed for their job, assess their own current competencies, and then create a development plan which will allow them to build their skills in order to meet the new demands of their job.

The chart below outlines the process that each individual needs to go through on a regular basis to assess their job, their skills, and their development needs.



DETERMINE COMPETENCIES REQUIRED

As you look at your current job or look at future jobs you desire to have, you need to determine the competencies needed to be successful in the job. Various tools provided can help you determine the competencies required. Some of the typical tools are listed below might be:

- Position Description
- Job Competencies
- Skill Assessment

ASSESS YOUR CURRENT COMPETENCIES

It is important to assess your own competencies on a regular basis to track your progress and plan your development. Some of the tools you might use for assessment are listed below:

- Performance Management System
- Coaching and Feedback
- Assessment Tools

CREATE A PLAN FOR PERSONAL DEVELOPMENT

You might consider creating a plan for your personal development. You might include a number of various learning and development opportunities in your plan. It will be up to each individual to proactively determine what are the most appropriate learning opportunities for them.

Some of the continuous learning opportunities are listed below.

CONTINUOUS LEARNING OPPORTUNITIES

Assessment and Feedback
Self-Assessment
Peer and Management Assessment
Peer and Management Feedback

mentor/Coach
Peer Mentor or Coach
Manager Mentor or Coach

Self-Study Resources
Books
Magazines/Periodicals
Research Reports
Videos

Team-Based Resources
Clubs
Associations
Team Meetings
Study Circle
Speakers
Videos

Special Projects
Project Work
Task Force
Benchmarking

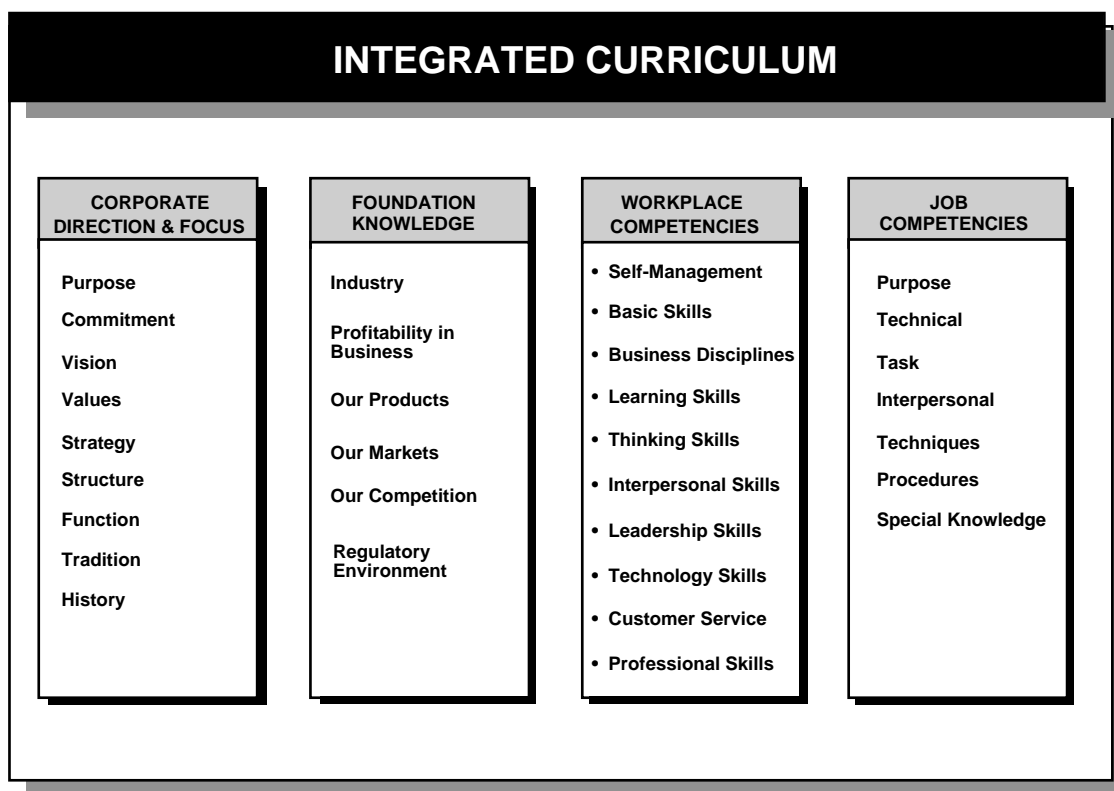
Classroom Training Program
Workshop Training
Extension Training

BEST PRACTICES STUDY
Benchmarking
Benchmark Training
Benchmark Coaching
Site Visits
Selected Benchmark Companies
Selected Business Unit Needs

INTEGRATED CURRICULUM

The requirements for job success are changing rapidly. To be successful in the workplace, one needs broad skills. Jobs today require employees to solve problems, think creatively, listen to co-workers and customers, negotiate, and, above all, know how to learn. Much of this skill set was previously required only of managers and supervisors.

As organizations adapt customer-driven practices and move decision-making down the organization, more and more employees must think and act like leaders. This has led Learning Environments to develop broad curricula that provide people with an understanding of the focus of the organization, foundation knowledge and workplace competencies.



DIRECTION AND FOCUS – PURPOSE, VISION, VALUES, CUSTOMER FOCUS

Learning organizations provide ongoing insight into the direction and focus of the organization to build people who are knowledgeable about the history, culture, traditions, and values of the company. Employees should be able to identify with the firm, its traditions, its purpose and mission and apply these to their own jobs.

FOUNDATION KNOWLEDGE – INDUSTRY, PROFITABILITY, PRODUCTS, COMPETITION

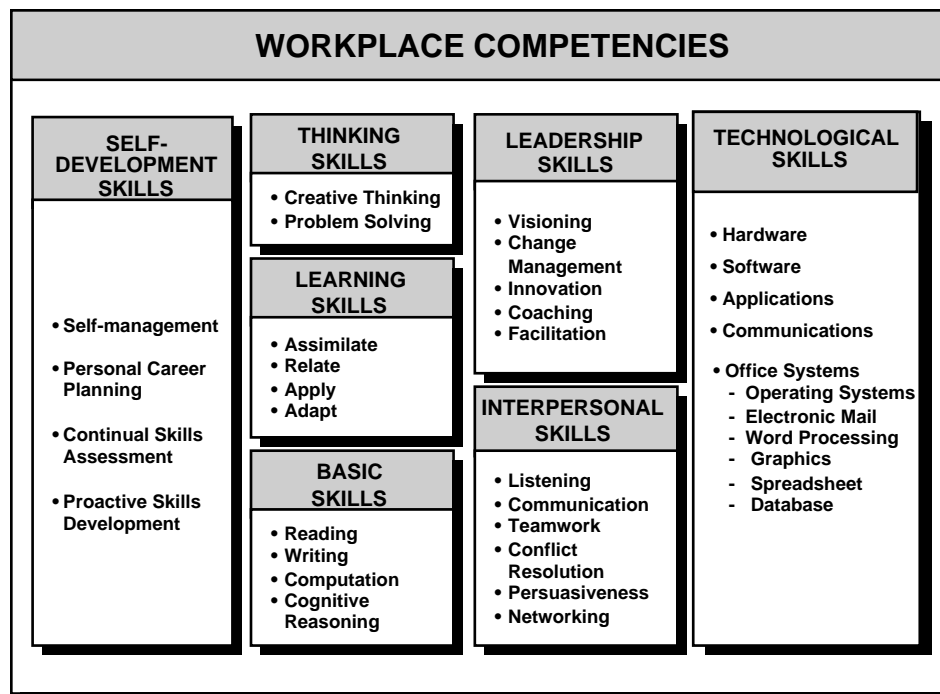
Foundation knowledge provides an understanding of the company's big picture and its products and services in the context of what competitors are offering in the marketplace and the best practices of the industry as a whole. Employees must understand the features and benefits of products, as well as how they measure up against competitors' products and services. Employees should be able to clearly communicate the company's strengths to customers and to other employees.

WORKPLACE COMPETENCIES

Specific competencies are those that the organization has identified as critical to its long-term success. Organizations should conduct research and benchmarking studies to target and define the set of workplace competencies required by employees to maintain competitiveness and momentum.

Workplace competencies vary from business unit to business unit. Typically, however, there are workplace competencies that include basic skill sets: learning skills, basic skills, interpersonal skills, creative thinking skills, leadership skills, and self-management skills.

These are competencies that the workplace is demanding of more employees. Many of the competencies are normally associated with excellent leaders. The workplace is demanding more employees to have this "leadership" skill set.



JOB COMPETENCIES

Job competencies are those needed specifically to perform a particular job. They typically include a clear understanding of the purpose, objectives and activities of the job. Certain unique task and technical skills may be required. A particular set of interpersonal skills and techniques may be needed. An understanding of a unique set of procedures or a body of specialized knowledge may be required.

BASIC CORE WORKPLACE COMPETENCIES*

In *Corporate Quality Universities*, Jean Meister has identified competencies needed in each of these areas. These courses develop a set of specific workplace competencies that define the company's competitive advantage. By the end of these courses employees will have developed the following competencies:

- 1. Self-development.** Employees will develop the ability to manage one's own career by identifying the skills and knowledge needed to be valuable in the workplace and working to acquire these skills. Employees will have the ability to proactively manage their own development and career, rather than follow a preordained training plan.
- 2. Basic skills.** These skills provide a command of reading, writing, and mathematics to handle increased decision-making on the front line and to handle the increased demand of all jobs.
- 3. Learning skills.** Employees will learn how to continually develop and master new skills and new roles. They will know how to understand and manipulate new information quickly and confidently. Above all, they will show a commitment to self-development and constant improvement of their skills and competencies.
- 4. Creative thinking and problem-solving skills.** Employees will know how to identify problems and see the connections between the solution discovered and possible approaches to the next problem. They will know how to recognize and define problems, implement solutions, and track and evaluate results. Above all, they will possess the cognitive reasoning skills necessary to transcend sequential thinking and leap to creative solutions.
- 5. Interpersonal skills.** Employees will know how to listen, communicate, and cooperate with other people in a work situation. They will know how to listen to and communicate with co-workers and customers, resolve conflicts constructively, negotiate, and network inside and outside the organization.
- 6. Leadership skills.** Employees will have a vision for their work team or department that fits into the organizational mission and goals. They will be able to empower co-workers and "envision, energize and enable" a group or team to achieve the corporation's business initiatives. They will know how to value a diverse workforce and how to recognize co-workers in a timely and appropriate fashion for a job well done.
- 7. Technical skills.** Employees will keep abreast of technological advancements which are critical to maintaining the competitive edge for the entire organization.

While many of these competencies were once associated primarily with managers, they are quickly becoming part of an empowered worker's tool kit in the 21st century. Those businesses that thrive will be those that organize themselves for learning and then capitalize on what they have learned.

* See Jean Meister, *Corporate Quality Universities*, for an expanded discussion of curricula.

KEYS TO SUCCESSFUL JOB PERFORMANCE

Business expects that any incoming employee will have a solid foundation of skills.

Basic Skills. The Basic Skills are reading, writing, arithmetic/mathematics, listening, and speaking.

Thinking Skills. The Thinking Skills are creative thinking, decision making, problem solving, being able to visualize problems and solutions, knowing how to learn, and reasoning.

Personal Qualities. The Personal Qualities are responsibility, self-esteem, sociability, self-management, and integrity/honesty.

1. **RESOURCES: IDENTIFIES, ORGANIZES, PLANS AND ALLOCATES RESOURCES**

- A. **Time** — Selects goal-relevant activities, ranks them, allocates time, and prepares and follows schedules.
- B. **Money** — Uses or prepares budgets, makes forecasts, keeps record, and makes adjustments to meet objectives.
- C. **Material and Facilities** — Acquires, stores, allocates, and uses materials or space efficiently.
- D. **Human Resources** — Assesses skills and distributes work accordingly, evaluates performance, and provides feedback.

2. **INTERPERSONAL: WORKS WITH OTHERS**

- A. **Participates as a Member of a Team** — Contributes to the group effort.
- B. **Teaches Others New Skills**
- C. **Serves Clients/Customers** — Works to satisfy customers' expectations.
- D. **Exercises Leadership** — Communicates ideas to justify a position, persuades and convinces others, responsibly challenges existing procedures and policies.
- E. **Negotiates** — Works toward agreements involving exchanges of resources, resolves differing interests.
- F. **Works with Diversity** — Works well with men and women from diverse backgrounds.

3. INFORMATION: ACQUIRES AND USES INFORMATION

- A. **Acquires and Evaluates Information**
- B. **Organizes and Maintains Information**
- C. **Interprets and Communicates Information**
- D. **Uses Computers to Process Information**

4. SYSTEMS: UNDERSTANDS COMPLEX RELATIONSHIPS

- A. **Understands Systems** — Knows how social, organization, and technological systems work and operates effectively with them.
- B. **Monitors and Corrects Performance** — Distinguishes trends, predicts impacts on system operations, diagnoses systems' performance and corrects malfunctions.
- C. **Improves or Designs Systems** — Suggests modifications to existing systems and develops new or alternative stems to improve performance.

5. TECHNOLOGY: WORKS WITH A VARIETY OF TECHNOLOGIES

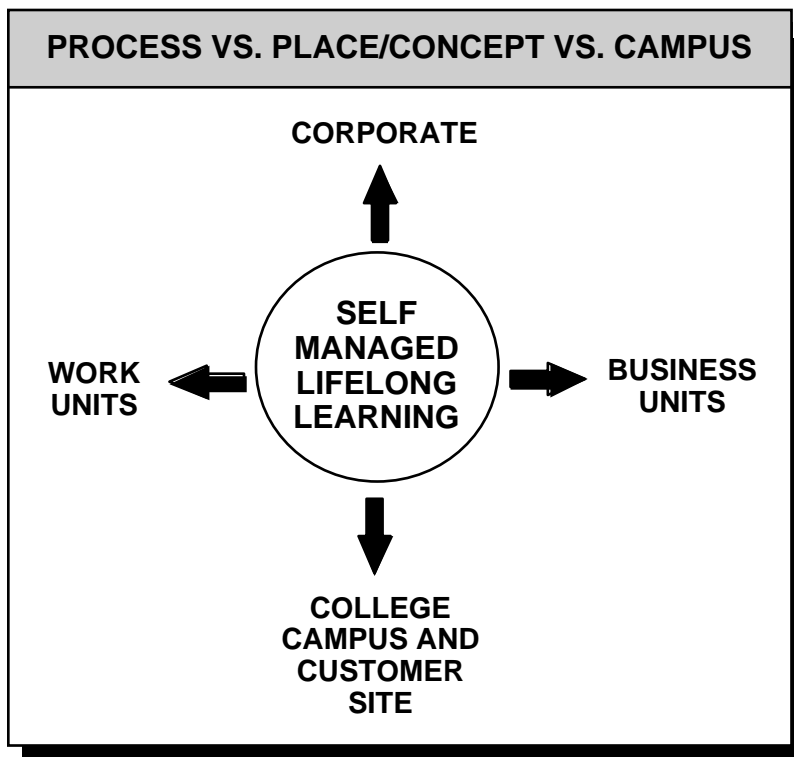
- A. **Selects Technology** — Chooses procedures, tools or equipment including computers and related technologies.
- B. **Applies Technology to Task** — Understands overall intent and proper procedures for setup and operation of equipment.
- C. **Maintains and Troubleshoots Equipment** — Prevents, identifies, or solves problems with equipment, including computers and other technologies.

• These skills and competencies were identified by the Secretary of Labor and the Secretary's Commission on Achieving Necessary Skills (SCANS). They are included in the report What Work Requires of Schools: A SCANS Report for America 2000, published by the U.S. Department of Labor.

CONTINUOUS — CONTINUOUS LEARNING PROCESS

Training can be an effective tool for ensuring individual and organizational lifelong learning. The Learning Organization prepares for change by increasing the competencies of its people and creates change through learning.

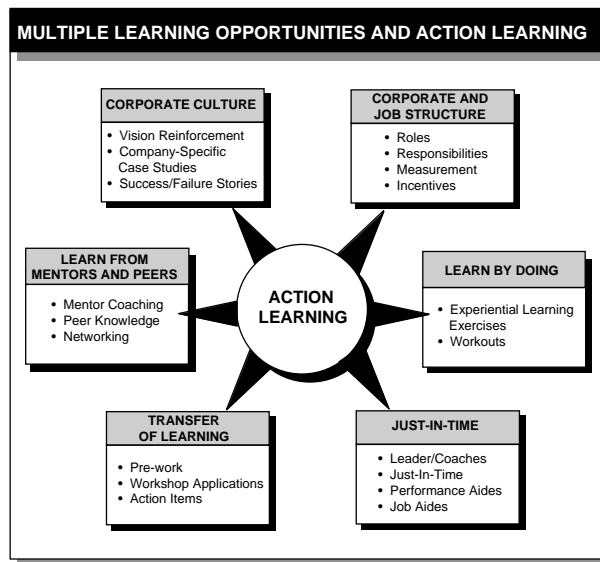
Training becomes more than a means of career advancement. It becomes embedded in the work life of all employees. Learning organizations recognize the importance of instilling within all employees a motivation to learn and continuously improve as the workplace changes over time.



Learning can take place at all levels of the organization – at the organizational level, at the business unit level, and at the work unit level. The decisions about where, how, and when to learn become decisions made based upon criteria such as efficiency and the intent of the training.

MULTIPLE CHANNELS FOR LEARNING

The continuous learning organization will provide many ways for employees to learn – both in the classroom and at the worksite. Training is no longer viewed as a way simply to help employees develop knowledge and new skills, but rather as a means to achieve improvements on the job. Some of the techniques organizations use fall into the following categories:



Organizational Culture. Success stories are an effective way to learn what is important to a company and how things really work. While this is not a new concept, what is new is how we can use it – detailing both company successes and failures to pass along important lessons learned by experience.

Organizational Structure. The communication of roles and goals and the measurement and incentives is used to do a great deal of behavior modification.

Learn by Doing. Learning by doing gets people actively involved in the learning process. They get a chance to work with real-world problems, propose solutions, and implement them in their jobs. They learn from their successes, their mistakes and the feedback they get from others.

Just-in-Time Learning. Just-in-time learning is designed to be done on demand and individualized. It can be distributed on demand, rather than delivered in a classroom format. The goal here is for employees to learn new skills just before they put them to use on the job. There is immediate transfer of the learning.

Transfer of Learning on the Job. Knowledge and skills learned in the classroom must be transferred on to the job. Employees must contribute to knowledge transfer. Managers and individual employees can work in partnership to devise ways for transferring knowledge to the workplace. Specific "Action Items" should be included in training to help structure the transfer of learning.

Learn from Mentors and Peers. Informal learning is an important means of increasing an employee's productivity on the job. It includes peer knowledge transfer, coaching from mentors, discussion, etc.

EXPANDED AUDIENCE

Learning environments are expanding their target audiences as they recognize the various entities that impact the success of the organization.

Employees. As organizations become flatter and as the marketplace becomes more uncertain, the whole notion of job security has been replaced by “career security.” Employees realize they must learn and practice a set of workplace competencies that are needed by the organization. The Learning Environment helps provide career security by designing processes and systems so employees take personal responsibility for learning and practicing core competencies.

Business Units. The focus of the Learning Environment is to help to build more effective employees and improve business results. In addition to core organizational training and resources, the Learning Environment partners with Business Units to provide training programs and resources unique to their business environment. This is done by tailoring core organizational programs or assisting in the development of new programs and resources.

Suppliers. Whenever possible, the Learning Environment should maintain flexibility by outsourcing training resources. Organizations can create a series of alliances with suppliers to ensure they understand the culture and context and can deliver the level of quality required.

Customers. Organizations should also look for ways to partner with customers to provide the training resources they need. For example, assisting external customers to run more successful and profitable businesses can enhance long-term relationships.

Colleges and Universities. Organizations can look for ways to more effectively partner with colleges and universities to provide the training resources needed.

MANAGING THE LEARNING ENVIRONMENT

Administration and Support

INTRODUCTION

The Learning Environment can be an important centralized source for key human resources, career development, and training. It can also provide a valuable function as a centralized source of information about resources. It can also assist in the coordination of resources that are needed on a just-in-time basis throughout the organization.

The chart below outlines the topics covered in this section.



EXPANDED ROLE OF TRAINING IN A LEARNING ORGANIZATION

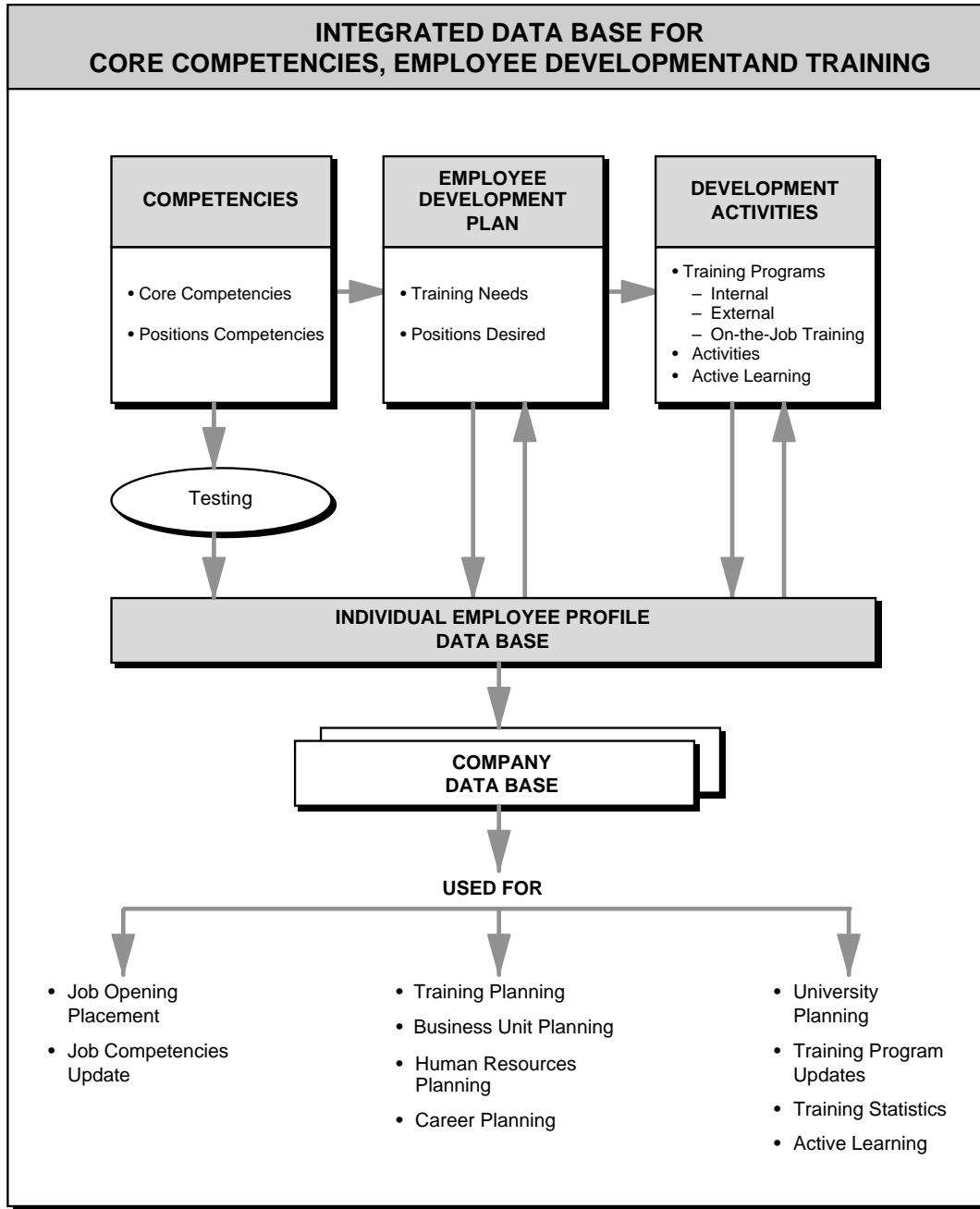
Organizations are shifting from some traditional training roles to an expanded role of training in the learning organization. The chart below summarizes some of the key elements of this shift.

	MORE TRADITIONAL TRAINING ROLE		EXPANDED ROLE IN LEARNING ORGANIZATION
GOAL	Upgrade technical skills <ul style="list-style-type: none"> • Management skills • Selected sales and service skills • Selected job skills 	+	Help implement business unit strategy Build core workplace competencies
INITIATIVE	Training initiated Employee initiated based upon: <ul style="list-style-type: none"> • Personal desires • Personal interest 	+	Management initiated based on: <ul style="list-style-type: none"> • Organizational strategy • Skills needed Employee initiated based upon: <ul style="list-style-type: none"> • Organizational skill needs • Personal education plans
LOCATION	Classroom focus	+	Job focused Multiple delivery options <ul style="list-style-type: none"> • Self paced/OJT • Internet/Intranet • Leader/Coach • Classroom
DURATION	<ul style="list-style-type: none"> • One time • Event driven 	+	Lifelong learning process tied to: <ul style="list-style-type: none"> • Organizational plans • Personal plans • Career plans
CURRICULUM	<ul style="list-style-type: none"> • Management skills • Some sales and service skills • Technical skills 	+	Coordination/administration <ul style="list-style-type: none"> • Personal career plans • Personal career records Leadership skills Core workplace competencies Core professional competencies Business, job-specific competencies
METHODOLOGY	Learning by listening, practicing	+	Learning by listening, practicing, doing, networking, and role modeling Proactive self management
AUDIENCE	Internal employees (largely professional managers)	+	All employees <ul style="list-style-type: none"> • Management • Sales • Service • Operations Other members of the expanded team <ul style="list-style-type: none"> • Customers • Product suppliers • Educational suppliers

INTEGRATED DATABASE

The Learning Environment can be a focal point for the kind of integrated database that is needed for a learning organization. Such a data base could provide a self management and career planning system to each individual with the easy access to the data they need to manage their own personal development in line with the competencies required by the organization.

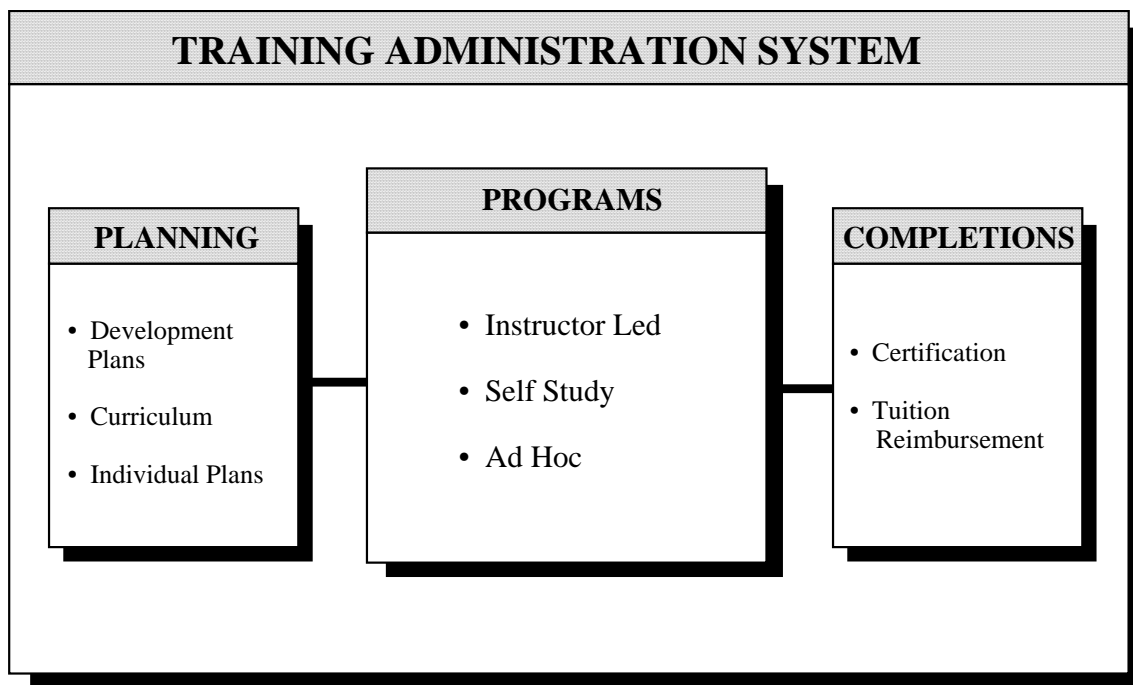
The chart below outlines how the Learning Environment might provide a valuable database for core competencies, training, and development.



TRAINING REGISTRATION AND INFORMATION

The Learning Environment will provide an all-in-one system for training administration. The “Training Administration System” (TAS) will provide support for various interrelated areas of training management. It will be designed so that you can make entries once and you can access the information from anywhere in the system. Once you learn to do things on one part of the system, you can apply the same techniques in other parts.

The chart below shows the key components of the system.



PLANNING

The training and development-planning component will give you a dynamic way to manage curriculums, development programs, and individual training and development plans.

TAS lets you create curriculums in limitless combinations. For example, you can nest curriculums within curriculums, or copy units from other curriculums and include instructor-led, self-study, and ad hoc courses. You can enroll students in curriculums, then tailor their development programs as needed. You can set up custom development programs for individual students. You can even mark development programs as future programs to explore “what if” scenarios.

TAS can help you by listing students whose training and development plans require certain courses, and by recording schedule and completion dates in students’ training and development plans. This will allow you to calculate student’s progress toward completion automatically.

PROGRAMS

The TAS system can help you keep track of the various types of training programs available for individual development.

Instructor-Led Training. The instructor-led training component should streamline scheduling, registration, correspondence, and reporting tasks to support classroom-training needs. You should be able to register students directly through or remotely through the TAS Remote Manager module. TAS automatically manages class waiting lists, posts skills and certifications, and updates training and development plans. In addition, you can work with students on course request lists. You can track drops, cancellations, and reschedule, and generate a variety of outputs to support your classes:

- Confirmation letters
- Name badges, tables
- Tents
- Completion certificates
- Etc.

Information about past and future classes is stored separately so historical records don't slow you down. "Quick Queries" give you the facts you need to make important decisions, while Checklist tickler files keep you ahead of the game. The calendars let you view class schedules by day, week, or month. You can also track course and instructor evaluations, schedule rooms for non-class related activities, track books, videos, and other loaned items, maintain projected and actual budgets, and generate, print and track invoices.

Self-Study Training. The self study training component is designed to help manage the unique characteristics of self-paced courses and individual self-study programs, on-the-job training, apprenticeships, and so on.

TAS allows you to track self-study records for individual students planned and actual start and end dates, tests, modules, and lessons, pre/post tests scores, reimbursement eligibility, and estimated costs. If you want, you can combine self-study courses to create individual self-study programs for students. You can then use the list of self-study programs for instant reference. You can also use the self-study training component's direct integration with tuition reimbursement and training and development records.

Ad Hoc and One Time Training. The ad hoc training component gives you a way to include seminar and conference participation, as well as historical training activity, in a student's training record.

You can record one-time training data, training history, and other miscellaneous information. Ad hoc data is stored along with students other training records so you can generate comprehensive transcripts.

COMPLETION

Competency Certifications. The skills and certifications component **tracks** the skill, certification, recertification, and competency requirements of employees. There are many options for tracking students' skills and certifications. Enter skills and certifications for individual, define skills and certifications required by specific job titles, or indicate which skills and certifications are achieved by taking a specific course. You can enter "one-time" skills, such as advanced degrees or foreign languages abilities, as well as certifications that need to be renewed periodically, such as safety training or driver's licenses.

For skills achieved by courses, TAS automatically posts completion dates and calculates renewal dates when students attend classes. The Quick Skills Query gives you instant access to lists of students meeting skills and certifications you specify.

Tuition Reimbursement. The tuition reimbursement component lets you manage the reimbursement process within your work unit. You can record students' applications for reimbursement, estimated and actual costs, completion information, and summary data for payments and approvals. You can set reimbursement rates and flag items that are not reimbursable.

TAS automatically tracks the amount remaining for each student for the period, and alerts you if the student goes over any maximum allowable reimbursement amount that you indicate. You can use these features by themselves or integrated with self-study training activities.

AN INTEGRATED APPROACH TO INDIVIDUAL DEVELOPMENT

The TAS system will be designed to assist each individual to "partner" with the organization in building the competencies and skill sets needed for success in their work units. It will assist training managers and business managers to obtain the data they need to plan and implement programs in a systematic way.

DELIVERY COORDINATION AND TRAINING LOGISTICS SUPPORT

Training Logistics Support will be one of the key functions of the Learning Environment. This function will be designed to support the logistics needs of organizational-wide and individual business unit training initiatives and programs.

DEFINITION AND ROLE OF TRAINING LOGISTICS SUPPORT

Definition of Training Logistics Support. All activities not directly related to the creation, delivery, or absorption of training materials.

Scope of Activities. Anything that is a distraction to the project manager, developer, trainer, or participant.

Objective. Attend to any detail that supports the project manager, developer, trainer or participant to focus on the content of the training event.

Relationship to the Project Team. Training logistics is a support function. The team member responsible for the logistics activities shares in the responsibility for the successful delivery of a training event.

Partnership with Training Project Manager. The logistics specialist needs to have a partnership relationship with the project manager of a training event. This includes recognition by both participants that the ultimate success of the project is the project manager's responsibility and the logistics specialist is responsible for supporting the project manager to meet his/her objective. The value added by the logistics specialist will be in direct proportion to the level of partnership with the project manager and the sharing of the responsibility.

ACTIVITIES HANDLED BY LOGISTICS SUPPORT

The following are the logistics activities that could be handled by logistics personnel.

Consulting. Provide information or strategic planning for the following logistic considerations:

1. Project Planning
2. Cost Analysis
3. Room Design, Characteristics, and Locations
4. Registration and Evaluation Management
5. Materials Production
6. Audio Visual Support
7. Instructor Development
8. Investigation and Integration of New Technologies into the Classroom

Managing. Implementation of the plans for the following:

1. Room Design and Locations
2. Registration Process
3. Evaluation Summarization and Reporting
4. Materials Production
5. Instructor Support

These activities would free the project manager, instructional designer, trainer, and participant to focus on the content of training.

LEVELS OF LOGISTICS SUPPORT

Training organizations typically have different roles. Therefore, different expectations for logistical support should exist depending upon the person being served. The following is a table of the training roles with the corresponding logistics role:

LEVELS OF LOGISTIC SUPPORT	
TRAINING ROLE	LOGISTICS ROLE
<p>Training Department Manager</p> <ul style="list-style-type: none"> • Sets the direction for the Training Department • Hires the Client Managers • Maintains client relationships at the senior level 	<p>Logistics Department Manager</p> <ul style="list-style-type: none"> • Sets the direction for the Logistics Department • Reports to Training Department Manager • Analyses and implements department-wide improvements for logistical activities • Hires and trains Logistics Managers • Maintains client relationship with Client Managers
<p>Training Manager</p> <ul style="list-style-type: none"> • Maintains client relationships • Sets the direction for serving the client's training needs • Hires the staff to service the training needs 	<p>Logistics Manager</p> <ul style="list-style-type: none"> • Reports to Logistics Department Manager • Analyses and implements client-specific improvements for logistical activities • Participates in the analysis and implementation of department-wide improvements for logistical activities • Supports delivery of specific training projects for client • Hires and trains Logistics Specialists • Maintains client relationship with Training Managers
<p>Project Manager</p> <ul style="list-style-type: none"> • Responsible for the successful delivery of a project • Creates the and manages to the project plan • Forms a team for delivering the project 	<p>Logistics Specialist</p> <ul style="list-style-type: none"> • Reports to Logistics Manager • Supports the delivery of specific training projects • Maintains vendor relationships

THE LEARNING
ENVIRONMENT

LEADER/COACH ROLE

Leader/Coaches rollout the programs out to participants or Peer Coaches and support them as they carry out their role. Leader/Coaches receive preparatory training on the program to prepare them for their role in rolling out to Peer Coaches.

Train Peer Coaches. L/C's will train the Peer Coaches in a one-day workshop.

Meeting One: Introduction. L/C's may be in attendance for the program "kickoff" with departments or work groups.

On-Going Support. L/C's can provide on-going support to Peer Coaches.

Meeting Two: Department Completion Session. Results will be reviewed by the Leader/Coach attending a completion session with the Peer/Coach, Department Manager and group participants. Certificates of successful completion will be provided at this meeting.

PEER COACH ROLE

Peer Coaches will work within individual departments and work units to carry out the program within the department. The Peer Coaches are selected by the department manager. The Peer Coaches will be trained by the Leader/Coaches.

Facilitate Meeting One — Introduction: Peer Coaches will facilitate meeting one with their department manager.

Coach Self-Development. Peer Coaches will coach participants through the Technology Self-Development Plan.

Learn. Learning Plan Creation will be designed jointly by the participant and the Peer Coach.

Analyze. Learning Needs Assessment will be carried out by the Peer Coach and the individual participant.

Certify. Competency Testing will be carried out by the Peer Coach and the individual participants.

Apply. The concepts will be applied in the department by all participants with the assistance of the manager and Peer Coach.

Timing of the Rollout of the Program with departments will be arranged by the Peer Coach and the department manager. There is a limitation on the date by which the program must be completed to accommodate the installation of the new e-mail system.

Facilitate Meeting Two: Peer Coaches will facilitate meeting two with their department manager.

On-Going Certification. Peer Coaches will assist individuals with their on-going technology certification.

EVALUATION AND REPORTING

The Learning Environment will provide a valuable evaluation and reporting function. It can provide centralized administration of evaluation and benchmarking approaches and information. It can also provide a centralized data base of information and management and training reports.

EVALUATION

A number of evaluation techniques can be built into the curriculum. Some of the types of evaluation that can be provided are listed below.

KNOWLEDGE, BEHAVIOR, AND ATTITUDES

Class Assessment. A participant post-class assessment will provide feedback on the training and course facilitators. Leader/Trainers are trained to consolidate this information and use it to improve their approach. This information can be centrally consolidated to measure trends, classroom success and spot problems.

Certification Exam Process. The exam will be designed to test participants' knowledge in core competencies. A score on each participant's performance will be provided.

In-Field Action Items. The post-workshop implementation and application of the skills and concepts is orchestrated by a series of post-workshop action items. The action items include management/subordinate interface and practice so that the concepts are applied and the objectives are achieved. These will provide specific observable behavior applications of core competencies and allow for actual on-the-job observation of changes in participants' knowledge, skills, and attitudes.

Core Competency Feedback Tool. A core competency feedback tool will be developed during the needs analysis phase. This tool can be used as a self-assessment tool to measure pre-class and post-class knowledge and skills. It can also be used as a management assessment and feedback tool.

Customer Focus Behaviors Assessment. Each program contains a behavior assessment tool which allows an individual to do a self-assessment. The tool can also be used for 360° feedback, coaching, and individual evaluation.

RETURN ON INVESTMENT

Team Solution Tracking. During the course of the program, team solutions will be developed as part of the continuous improvement training. The results of these projects can be measured in increased customer service, expense savings, revenue generation, etc. These results can be tracked and consolidated to demonstrate the tangible, bottom line impact of the program.

Other ROI Measurements. Other ROI measurements can be used which link training impact on improved service quality, sales results, service results, etc.

REPORTING

A number of reports can be provided. Several are listed on the next page.

TRAINING REPORTS

The reports listed below are just some of the reports that can be produced with Training Administration System.

Courses

- Course List
- Course Catalog
- Course Instructors
- Classes Scheduled
- Classes Held
- Course Evaluation Summary

Class Attendance

- Grade Notice
- Completion Certificate
- Invoices

Instructors

- Instructor List
- Instructor Detail
- Approved to Teach Text
- Classes Taught
- Upcoming Schedule
- Instructor Evaluation Summary

Organizations

- Student Organization List
- Instructor Organization List
- Course Provider List
- Credits Earned Detail
- Credits Earned Summary
- Organization Spending Detail
- Organization Spending Summary
- Budget Detail
- Budget Summary

Class Sign-Up

- Confirmation Letter
- Completion Certificate
- Invoices

Classes Held

- Class Detail
- Completion Certificate
- Class Evaluation Form
- Class Evaluation Summary
- Grade Report
- Grade Notice
- Invoices

Students

- Student List
- Student Detail
- Transcripts
- Upcoming Schedule

Class Schedule

- Master Schedule
- Scheduled Class Detail
- Confirmation Letter
- Completion Certificate
- Class Evaluation Form
- Invoices

Loaner Library

- Materials List
- Loaning History
- Check Out Form
- Overdue Notice

Invoice Control

- Invoices
- Aging List

Budgets

- By Organization
- By Year
- By Usage Level

**Designing
The
Learning Environment**

LEARNING ENVIRONMENT CURRICULUM

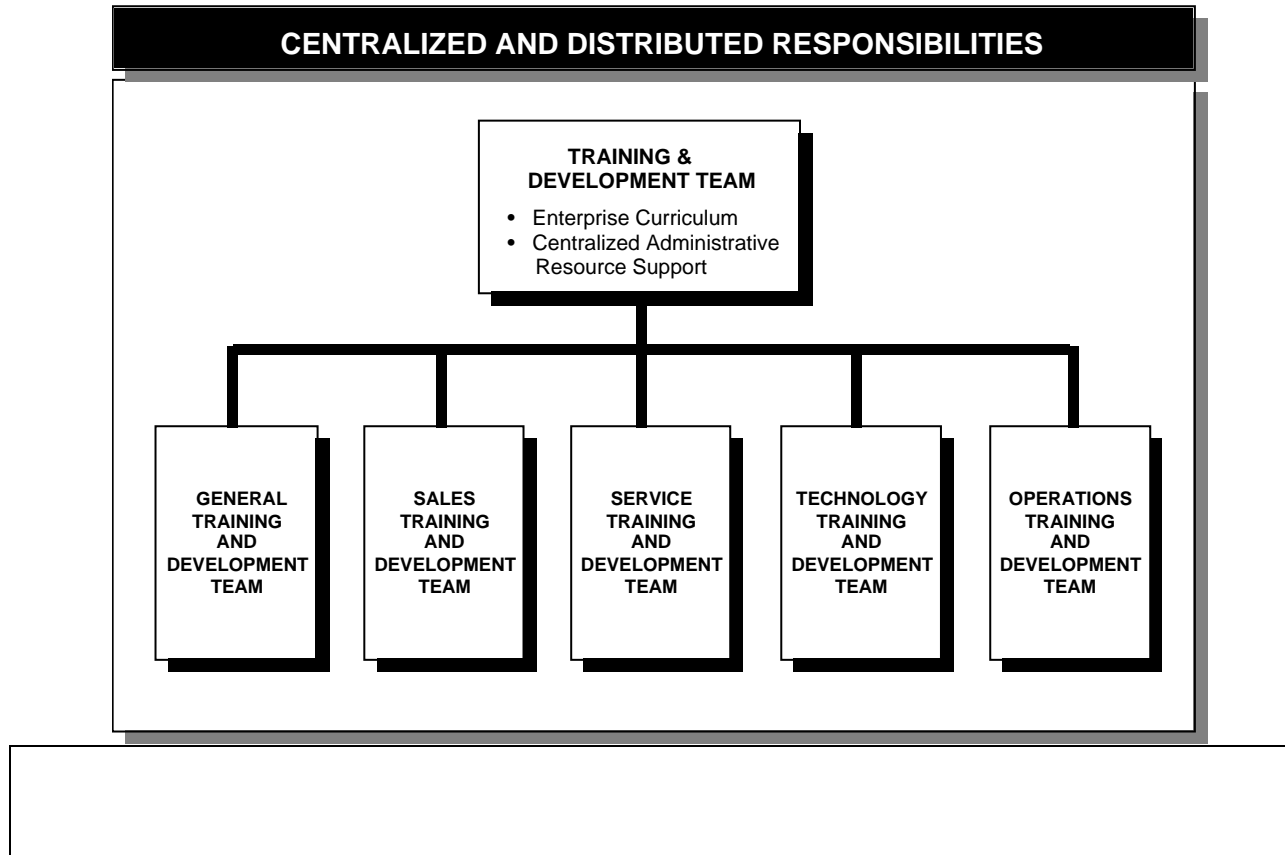
For the Enterprise to successfully create an environment of learning to grow people and the enterprise, the following needs to be developed:

1. **A Framework for culture-creation** and coordinated programming that supports appropriate alignment and integration.
2. **Enterprise-wide** support of the Enterprise Strategy and programs/resources to support the business disciplines and desired culture.
3. **Business unit** developing and delivering programs that support high performance.
4. **Individuals** taking personal accountability for their learning with personal development plans.

The Learning Environment will be an approach that will provide administration, consulting, and training resources on a centralized basis when appropriate and assist business units to provide training on a decentralized basis when appropriate.

The company's Training and Development Team will provide for the design and coordination delivery of an enterprise curriculum through programs in core competencies such as leadership, management, customer focus, and risk management. Centralized administration and resource support will also be developed as appropriate.

Business specific training teams will provide "one-stop shopping" training support to businesses in Management, Sales, Service, Technology, and Operations. This will require partnering amongst current training teams to provide "seamless" support.

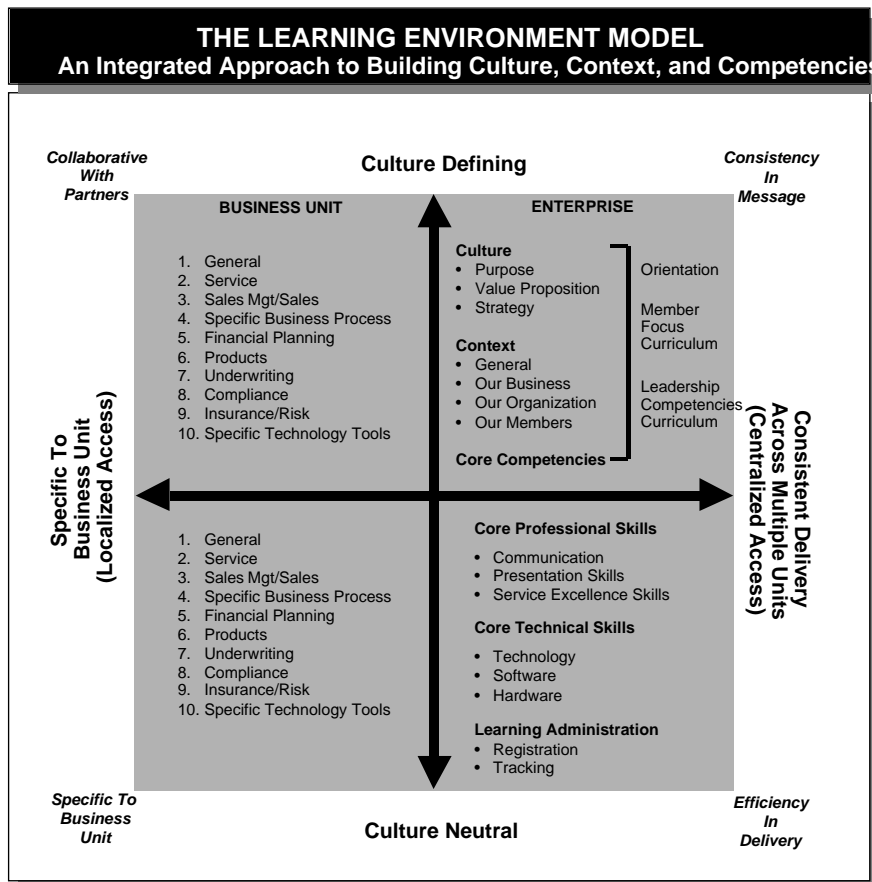


THE CULTURE-CONTENT MODEL: DEFINING CORPORATE AND BUSINESS UNIT RESPONSIBILITIES

The organization needs to balance the need for a consistent corporate-wide message and responsive business specific delivery. The Culture-Content Model can facilitate the discussion on how and where learning can be designed, delivered, and administered. The Culture-Content Model can facilitate the dialogue on this topic — a dialogue that is based on logic rather than emotion, future philosophy rather than historical inertia.

Two questions are asked of any program that the Learning Environment offers:

1. **Culture Defining.** To what extent is the program “culture defining” and essential for the understanding of the organizations’ business, industry, and strategy?
2. **Delivery Location.** To what extent is the program common in its delivery to multiple units?



Two additional questions should also be asked of every program:

1. To what extent can core corporate programs be tailored to ensure meaningful business specific delivery?
2. To what extent can business specific programs reflect key corporate messages?

TYPES OF TRAINING PROGRAMS — PROGRAM CATEGORIES

The Learning Organization can provide a number of different types of programs. The following categories depict the major areas of training.

TRAINING PROGRAM CATEGORIES		
<ul style="list-style-type: none">• CULTURE• CONTEXT• BUSINESS DISCIPLINES• LEADERSHIP/ MANAGEMENT	<ul style="list-style-type: none">• GENERAL• SALES• SERVICE	<ul style="list-style-type: none">• PRODUCT• COMPLIANCE• TECHNOLOGY

Culture. The courses under this heading are those which develop the corporate culture – to build corporate citizens who are knowledgeable about the history, culture, traditions and values of the company. The goal is to engender a strong feeling of attachment and connection to the company similar to what citizens feel for their city or country. Employees should be able to identify with the firm and its traditions, and to live the corporate purpose and mission in their day-to-day jobs.

Context. These courses provide contextual reference, which refers to a well-informed understanding of the company’s big picture and its products and services in the context of what competitors are offering in the marketplace and the best practices of the industry as a whole. Programs and initiatives should be designed to train employees in the features and benefits of products, as well as how they stack up against competitor’s products and services. The goal is for all employees to be able to clearly communicate the company’s strengths to both current and prospective employees and customers. These courses will define: our products, our markets, and our competition.

Business Disciplines. These courses provide basic skills in getting along in the business. Skills include meeting management, telephone and voice mail, e-mail, etc. The goal is to provide a consistent level of internal service quality and a consistent way of getting things done within the enterprise.

Leadership/Management. These courses provide the leadership and management skills needed to indoctrinate all managers with the same philosophy and reinforce desired practices and behaviors.

General. General will provide programs designed to meet the needs of General Officers, members and the Field team.

Sales. Relationship Selling Skills and Financial Planning Skills are important in building long-term relationships with customers. Sales programs that provide the core selling and negotiating skills and can be tailored to the needs of various business units will be available.

Service. Customer focus core training will address much of the need to provide internal and external service awareness. Additional courses that relate to service delivery will be provided on a “just-in-time” basis throughout the enterprise to improve collaboration, teamwork, and creative problem solving.

Product. Product training and certification can be done systematically with all new hires. It can be done on a regular “drive” basis where appropriate with the current sales team. Other areas of the organization have their individual product training courses as well. A systematic approach to product training and reinforcement is desired, particularly in areas of high turnover and concentrated customer contact in the organization.

Compliance. Compliance training courses will be provided on a basic and advanced level group. Additional programs will be developed.

Technology. Technology and Operations Education will continue to provide a large variety of technical and technological courses.

INTEGRATED CURRICULUM APPROACH

ENTERPRISE CULTURE AND CONTEXT

Learning Strategy and Approach

- Career Learning Track
- Certification
- Standards for Design and Delivery

Business and General Context

- Our Business
- General
- Our Organization
- Our Members

Organizational Systems

- Enterprise Strategy
- General Strategy
- Sales Strategy
- Business Processes and Technology
- Performance Measurement and Management
- Compensation — Reward and Recognition

BUSINESS UNIT SPECIFIC

SALES BUSINESS UNITS

- Sales and Marketing Strategy
- Sales Management Skills/Tools
- Sales Skills/Tools
- Financial Planning Skills/Tools
- Product Solutions/Tools
- Technology Skills/Tools
- Pre-Licensing Skills/Requirements
- Underwriting Knowledge/Tools
- Compliance/Regulations

GENERAL BUSINESS AND VOLUNTEER UNITS

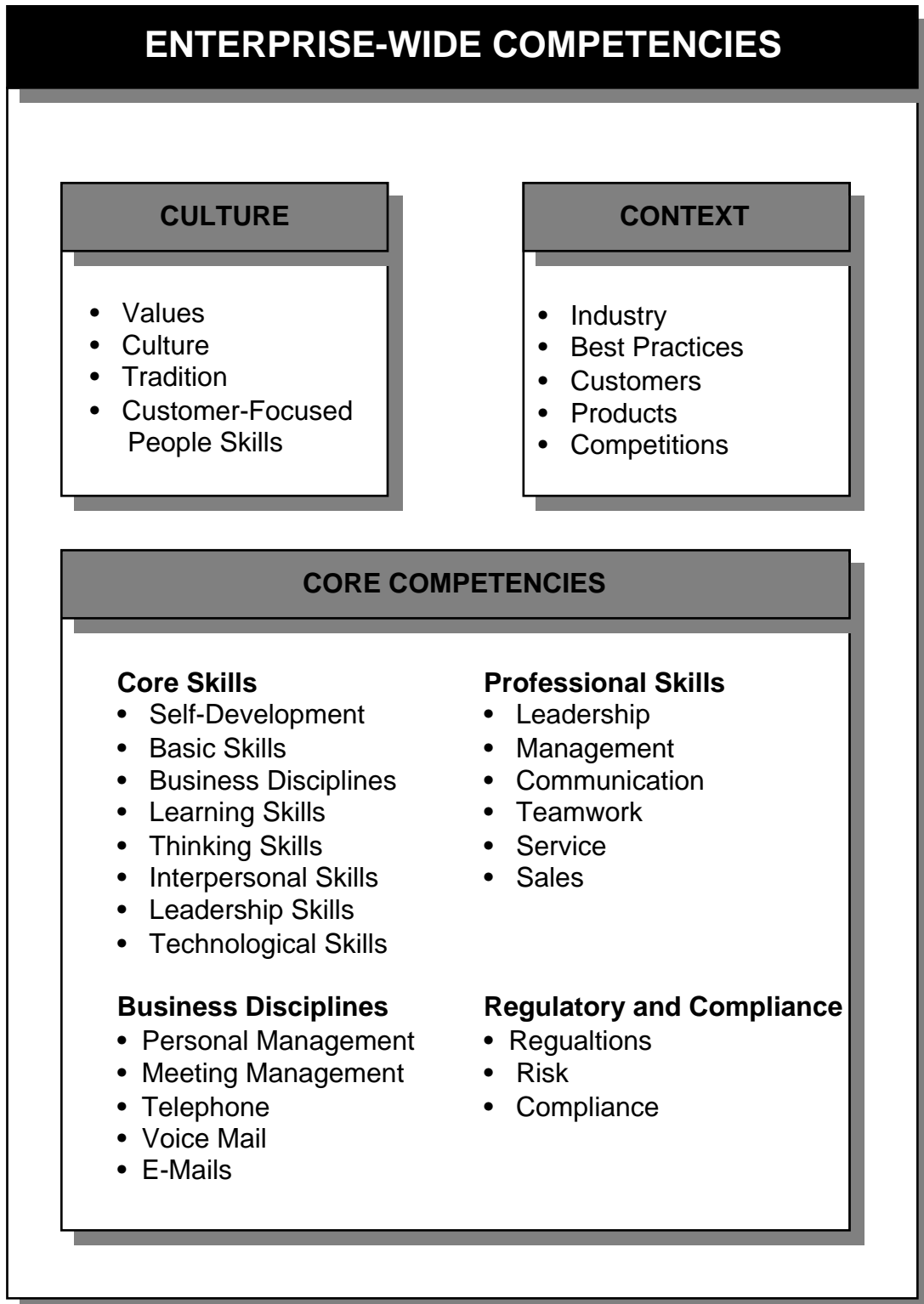
- General Strategy/Member Involvement
- Community Investment and Marketing Skills/Tools
- Infrastructure and Distribution Skills/Tools
- Volunteerism and Service Skills/Tools
- Governance

SERVICE UNITS

- Service Strategy
- Service Excellence Skills

CORE KNOWLEDGE – ENTERPRISE-WIDE COMPETENCIES

Consistency in basic core competencies is important to ensure certain common purposes and processes across multiple units. The primary focus of the central unit training efforts are outlined below.

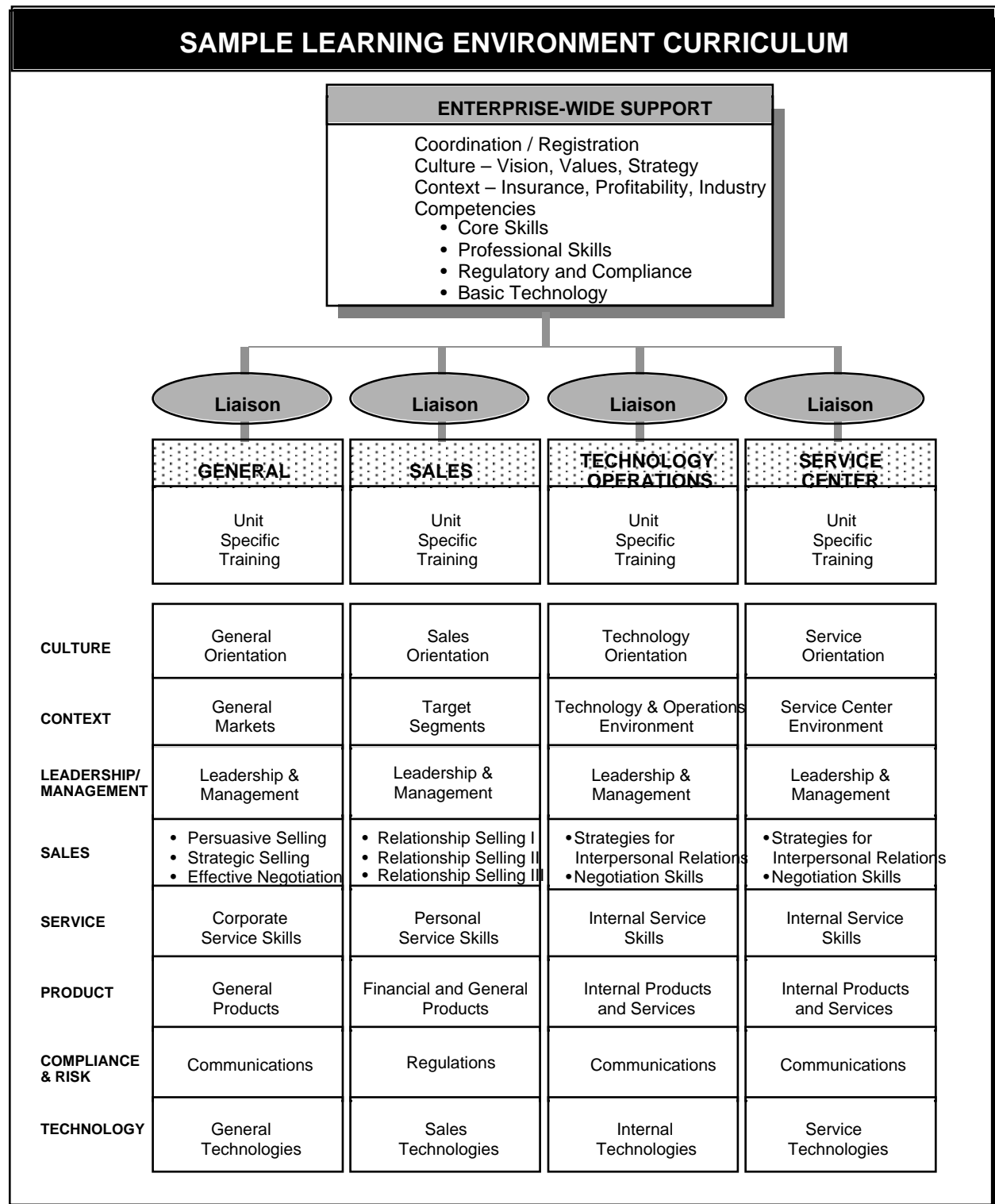


CUSTOMER FOCUS LEARNING ENVIRONMENT CURRICULUM

CUSTOMER FOCUS SKILLS	EXPANDED CURRICULUM	LEARNING ENVIRONMENT CURRICULUM
<p>EMPLOYEES:</p> <p>CUSTOMER FOCUSED SERVICE</p> <p>MANAGEMENT:</p> <p>CUSTOMER FOCUSED LEADERSHIP</p>	<p>Customer</p> <ul style="list-style-type: none"> • Identify Customer Needs • Customer Service Training • Understanding Customer Data <p>Teamwork</p> <ul style="list-style-type: none"> • Diversity • PROGRESS • Teambuilding • Influence: Collaborating for Results <p>Candor</p> <ul style="list-style-type: none"> • Dialogue • Effective Listening Skills • Negotiating Skills <p>Capability</p> <ul style="list-style-type: none"> • Facilitation Skills • Presentation Skills • Writing Skills <p>Service</p> <ul style="list-style-type: none"> • Quality Service Skills • Service Excellence • Quality Service Skills <p>Efficiency</p> <ul style="list-style-type: none"> • Decision Express • Employee Workshop for Organizational Change • Business as Unusual • Time Systems Organizer • Time Management • Project Management <p>Integrity</p> <ul style="list-style-type: none"> • Sexual Harassment • Diversity • Ethics • Risk Awareness • Risk Management <p>Other Individual Courses to be determined based on needs.</p>	<p>An integrated curriculum consisting of a series of courses that are tailored to the specific areas of the Enterprise to which they are offered:</p> <p>Service</p> <ul style="list-style-type: none"> • Consultative Selling Skills • The Sales/Service Connection • Telemarketing Skills • Other Appropriate Courses <p>Sales</p> <ul style="list-style-type: none"> • Relationship Selling I • Relationship Selling II • Account Analysis & Planning • Effective Negotiating Skills • Sales Presentation Skills • Other Appropriate Courses <p>Sales Management</p> <ul style="list-style-type: none"> • Sales Management I/II • Account Analysis & Planning • Effective Negotiating Skills • Sales Presentation Skills • Other Appropriate Courses <p>Management/Leadership</p> <ul style="list-style-type: none"> • Introduction to Management • Targeted Selection • Performance Management • Standards and Objectives • Problem Resolution • Other Appropriate Courses <p>Product Knowledge</p> <p>As outlined by business unit/division</p> <p>Credit Training</p> <p>As outlined by Credit Training</p> <p>Technology/Operations</p> <p>As outlined by T/O Education</p>

ENTERPRISE AND BUSINESS UNIT LIAISON

There will be continual enterprise and business unit liaison in the planning, development and delivery of programs. Whenever possible, collaboration approaches will be used. The chart below provides a model of how various units might collaborate.



Building Your Learning Environment Curriculum

BUILDING YOUR LEARNING ENVIRONMENT CURRICULUM

To begin the process of building your Learning Environment, it is helpful to conduct a study of the business need for skill development, as well as an assessment of where you currently are in the process. A simple four-step process is recommended, as follows:

BUILDING YOUR LEARNING ENVIRONMENT CURRICULUM

1. Assess the Business Strategy
2. Conduct a Needs Assessment
3. Develop the Curriculum
4. Put Your Training Plan into Action

1. Assess the Business Strategy

An organization will need to assess future goals and objectives of the strategic plan. Review those goals and try to determine how well employees are able to support needs of the organization. Identify gaps in the current training and development curriculum.

2. Conduct a Needs Assessment

Review each business unit or work unit to determine the training needs. Survey individuals, conduct a round of telephone calls or set up an advisory board to gather the information needed to make an assessment. Involve both managers and staff. Draft a preliminary needs assessment and discuss the document with the advisory group.

3. Develop the Curriculum

Based on the information from the advisory panel, put together a listing of skills or “core competencies” to be developed for each employee group, along with the suggested solution. Look at the current curriculum and add in Merit modules to fill the gaps.

4. Put The Training Plan into Action

Work up a schedule for training and set out a curriculum for each employee group. Require that employees take responsibility for their own training and development. Offer self-paced courses, computer-based courses and video training programs. Utilize effective training media that is enjoyable and motivating.

CRITERIA FOR TRAINING PROGRAM EVALUATION

Organizations will need to analyze the effectiveness of the training resources currently in use and in developing future programs. A standard from which all training can be evaluated is helpful in conducting the initial needs assessment.

The following criteria are provided as examples:

CRITERIA FOR TRAINING PROGRAM EVALUATION	
1.	REINFORCEMENT OF CULTURAL MESSAGES
2.	REINFORCEMENT OF BUSINESS IMPERATIVE
3.	RELEVANCE TO JOB
4.	FLEXIBILITY
5.	SOUND INSTRUCTIONAL DESIGN METHODOLOGY

Based upon the Learning Environment philosophy and principles, there are several key criteria against which training programs and curricula can be assessed:

1. REINFORCEMENT OF CULTURAL MESSAGES

- a. **Senior Management Strategy.** To what extent do they reflect senior management's perspective of how the communication and training process can contribute to a more effective and rapid implementation of the strategy?
- b. **Develop Culture.** To what extent do the training components help to develop the culture needed to compete effectively?
- c. **Achieve Objectives for Business Unit Strategy.** To what extent does the training contribute to the achievement of the objectives of the business units?
- d. **Multiple Initiatives.** To what extent do they clarify how the multiple company initiatives are linked to the organizational strategy to provide a more integrated picture of the strategic direction of the organization?
- e. **Core Competencies.** To what extent do they reinforce and build upon the core competencies needed for success?

2. REINFORCEMENT OF BUSINESS IMPERATIVE

- a. **Reinforce Business Reason.** To what extent does the training reinforce the business reason for conducting the training?
- b. **Solve Business Problems.** To what extent are real problems used and solved during the training?
- c. **Performance Standards Tied to Business Strategy.** To what extent is the material relevant to the performance management standards?
- d. **Cost Justification.** To what extent does the training contribute to the financial performance of the organization? Are the results to be achieved clearly delineated? Can we measure the results?

3. RELEVANCE TO THE JOB

- a. **Tailored to Audience.** To what extent can the training modules be tailored to the needs of the business unit?
- b. **Real Situations.** Do training activities reflect “real” situations that the employee will encounter?
- c. **Core Competencies.** Do the training activities teach core competencies needed on the job?
- d. **Appropriate to Career Stage.** Is the component relevant to the trainees’ jobs at that particular stage in their career?

4. FLEXIBILITY

- a. **Effective Use of Time.** Is the training an effective use of time? Is the length of the course appropriate for the objective to be obtained?
- b. **Effective Use of Training Resources.** To what extent do they make the best use of training resources currently available in the organization? How can we best utilize available materials, people, and other training resources as part of the overall training and implementation strategy?
- c. **Easy to Use for Non-Professional Trainers.** To what extent are the training components “user friendly”? Is the training process easy to implement and monitor given the constraints of staffing levels? Can non-professional trainers be certified easily? Once the methodology is learned, can trainers teach other modules without extensive re-certification?
- d. **Multiple Formats.** To what extent is the training offered in alternative formats? Is the training adaptable to the needs of non-traditional work hours? Is the material presentable in shorter modules? Is the material effective on a self-paced basis?

5. SOUND INSTRUCTIONAL DESIGN METHODOLOGY

- a. **Business Strategy Context.** To what extent does the training refer to the business need for the training? Are real-life examples used in the training to reinforce the meaning and usefulness of the training?
- b. **Use of Consistent Models.** Are models used to give participants an overview of the course? Is this model used throughout the phases of the training? Do subsequent courses reinforce the model? Do participants understand and see the usefulness of the model?
- c. **Three Phases of Training.** Are pre-workshop assignments required? Are post-workshop implementation action items built into the training? Is the training reinforced by managers or co-workers?
- d. **Well Documented Leader's Guides.** Are trainer materials easy to use and refer to? Are leader's notes provided? Are answers to exercises provided when applicable? Are charts, overheads and leader's aids provided?
- e. **Interactive Training.** Does the training use varied media for delivery? Are the participants engaged into the training with exercises, role plays, demonstrations, etc.? Are techniques used to communicate with all types of learners (visual, audio and kinesthetic) employed in the training?

TRAINING PROGRAM EVALUATION

Program: _____

Low High

1. REINFORCEMENT OF CULTURAL MESSAGES.

- a. Senior Management Strategy. 1 2 3 4 5 6 7 8 9 10
- b. Develop Sales Culture. 1 2 3 4 5 6 7 8 9 10
- c. Achieve Objectives for the Business Strategy. 1 2 3 4 5 6 7 8 9 10
- d. Multiple Initiatives. 1 2 3 4 5 6 7 8 9 10
- e. Core Competencies. 1 2 3 4 5 6 7 8 9 10

2. REINFORCEMENT OF BUSINESS IMPERATIVE

- a. Reinforce Business Reason. 1 2 3 4 5 6 7 8 9 10
- b. Solve Business Problems. 1 2 3 4 5 6 7 8 9 10
- c. Performance Standards Tied to Business Strategy . 1 2 3 4 5 6 7 8 9
- d. Cost Justification. 1 2 3 4 5 6 7 8 9 10

10

3. RELEVANCE TO THE JOB

- a. Tailored to Audience. 1 2 3 4 5 6 7 8 9 10
- b. Real Situations. 1 2 3 4 5 6 7 8 9 10
- c. Core Competencies. 1 2 3 4 5 6 7 8 9 10
- d. Appropriate to Career Stage. 1 2 3 4 5 6 7 8 9 10

4. FLEXIBILITY

- a. Effective Use of Time. 1 2 3 4 5 6 7 8 9 10
- b. Effective Use of Training Resources. 1 2 3 4 5 6 7 8 9 10
- c. Easy to Use for Network Trainers. 1 2 3 4 5 6 7 8 9 10
- d. Multiple Formats. 1 2 3 4 5 6 7 8 9 10

5. SOUND INSTRUCTIONAL DESIGN METHODOLOGY

- a. Business Strategy Context. 1 2 3 4 5 6 7 8 9 10
- b. Use of Consistent Models. 1 2 3 4 5 6 7 8 9 10
- c. Three Phases of Training. 1 2 3 4 5 6 7 8 9 10
- d. Well Documented Leader's Guides. 1 2 3 4 5 6 7 8 9 10
- e. Interactive Training. 1 2 3 4 5 6 7 8 9 10

Total Score _____

Comments: _____

TRAINING NEEDS ANALYSIS WORKSHEET

Target Audience: _____ Date: _____

Purpose of the Analysis: _____

KEY SKILL AREA	NEEDS ASSESSMENT		COMMENTS AND/OR ACTION STEPS
	Low Need	High Need	
I. PERSONAL AND CAREER DEVELOPMENT SKILLS			
1. Self Development	1	2 3 4 5 6 7 8 9 10	
2. Career Development	1	2 3 4 5 6 7 8 9 10	
3. Empowerment	1	2 3 4 5 6 7 8 9 10	
II. COMMUNICATION AND INTERPERSONAL EFFECTIVENESS SKILLS			
1. Communication	1	2 3 4 5 6 7 8 9 10	
2. Effective Listening for Improved Communication	1	2 3 4 5 6 7 8 9 10	
3. Strategies for Interpersonal Relationships	1	2 3 4 5 6 7 8 9 10	
4. Conflict Resolution	1	2 3 4 5 6 7 8 9 10	
III. TEAM DEVELOPMENT SKILLS			
1. Teamwork	1	2 3 4 5 6 7 8 9 10	
2. Creative Problem Solving	1	2 3 4 5 6 7 8 9 10	
3. Encourage Innovation	1	2 3 4 5 6 7 8 9 10	
4. Encourage Improvement	1	2 3 4 5 6 7 8 9 10	
IV. CUSTOMER SERVICE SKILLS			
1. Telephone Skills	1	2 3 4 5 6 7 8 9 10	
2. A Positive Attitude	1	2 3 4 5 6 7 8 9 10	
3. Conveying Knowledge	1	2 3 4 5 6 7 8 9 10	
4. Identifying Customer Expectations	1	2 3 4 5 6 7 8 9 10	
5. Your Role in Delivering Excellent Service	1	2 3 4 5 6 7 8 9 10	
V. MARKETING AND SALES EFFECTIVENESS SKILLS			
A. Market Analysis and Planning			
1. Analyze Your Marketplace	1	2 3 4 5 6 7 8 9 10	
2. Develop a Marketing Plan	1	2 3 4 5 6 7 8 9 10	
3. Prospecting	1	2 3 4 5 6 7 8 9 10	
4. Marketing by Mailing	1	2 3 4 5 6 7 8 9 10	
5. Control Marketing Results	1	2 3 4 5 6 7 8 9 10	
B. Account Analysis and Planning			
1. Prepare: Understanding Your Customer's Needs	1	2 3 4 5 6 7 8 9 10	
2. Analyze Customer Accounts	1	2 3 4 5 6 7 8 9 10	
3. Strategize Customer Accounts	1	2 3 4 5 6 7 8 9 10	
4. Organize Customer Accounts	1	2 3 4 5 6 7 8 9 10	
5. Implement Customer Relationships	1	2 3 4 5 6 7 8 9 10	

C. Consultative Selling Skills		
1. Relate to the Client	1 2 3 4 5 6 7 8 9 10	
2. Discover Your Client's Needs	1 2 3 4 5 6 7 8 9 10	
3. Present Solutions	1 2 3 4 5 6 7 8 9 10	
4. Resolve	1 2 3 4 5 6 7 8 9 10	
5. Confirm and Take Action	1 2 3 4 5 6 7 8 9 10	

TRAINING NEEDS ANALYSIS WORKSHEET (CONTINUED)

KEY SKILL AREA	NEEDS ASSESSMENT		COMMENTS AND/OR ACTION STEPS
	Low Need	High Need	
VI. LEADERSHIP AND MANAGEMENT SKILLS			
A. Creating Organizational Excellence 1. Establishing a Philosophy of Organizational Excellence 2. Developing and Communicating Your Vision and Mission 3. Managing Change	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
B. People Management 1. Accepting a Management Role 2. Recruit a High Performance Team 3. Orient New Team Members 4. Train and Provide a Career Path 5. Plan and Appraise Performance 6. Motivate and Compensate	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
C. Performance Management 1. Roles and Responsibilities 2. Standards and Objectives 3. Monitoring Performance and Providing Feedback 4. Coaching for Optimal Performance 5. Reinforce, Recognize and Reward	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
D. Measuring Productivity and Efficiency 1. On-The-Job Training 2. Unleashing the Power of Employee Efficiency 3. Understanding Profitability 4. Overcoming Negativity in the Workplace	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
E. Management Tools and Techniques 1. Time Management 2. Project Management 3. Meeting Management 4. Presentation Skills 5. Effective Negotiating Skills	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
F. Process Improvement/Quality 1. Streamlining Business Processes 2. Benchmarking the Best Practices	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
G. Business Law and Management 1. Business Ethics 2. Diversity 3. Employment Law Basics for Managers 4. Preventing Workplace Sexual Harassment	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	

APPENDIX A

Personal Learning Planner

THE LEARNING
ENVIRONMENT

INSERT PERSONAL LEARNING PLANNER

APPENDIX B

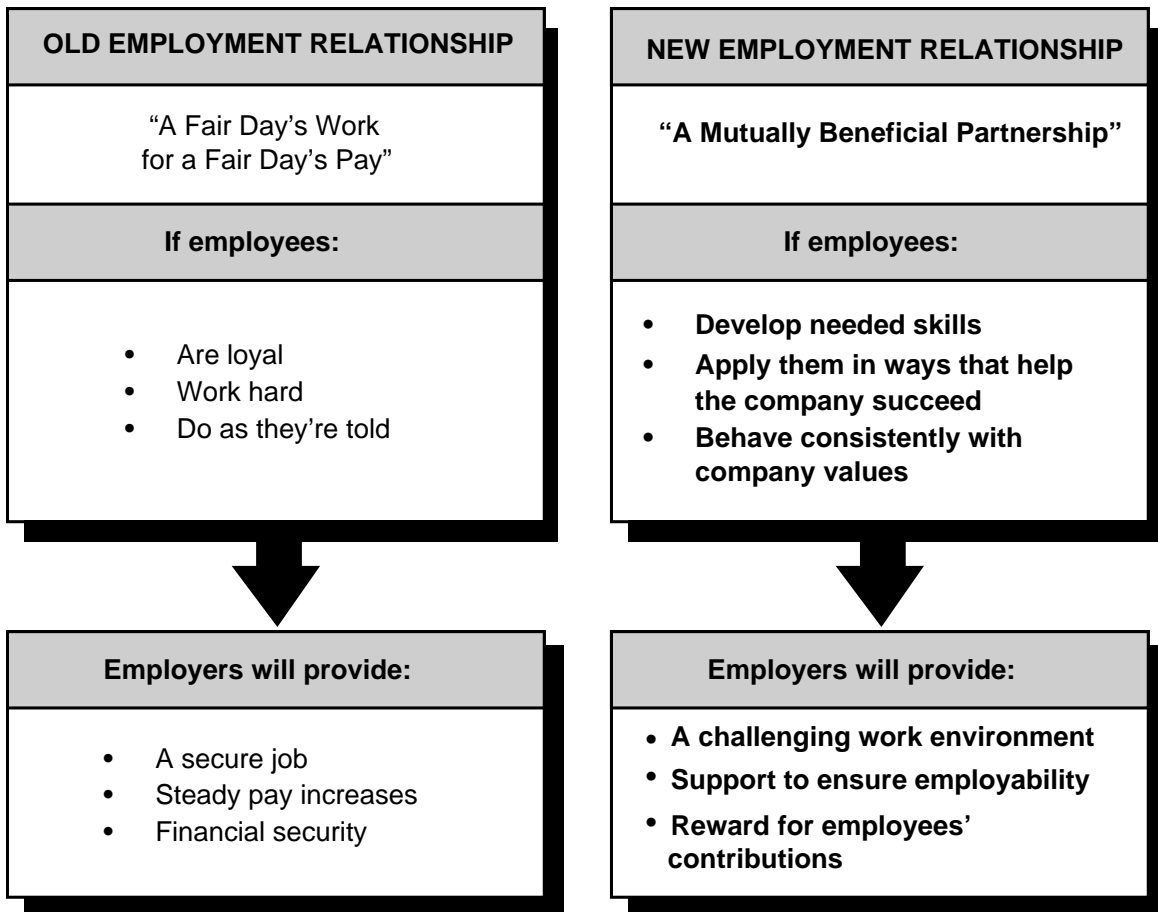
Charts and Graphics

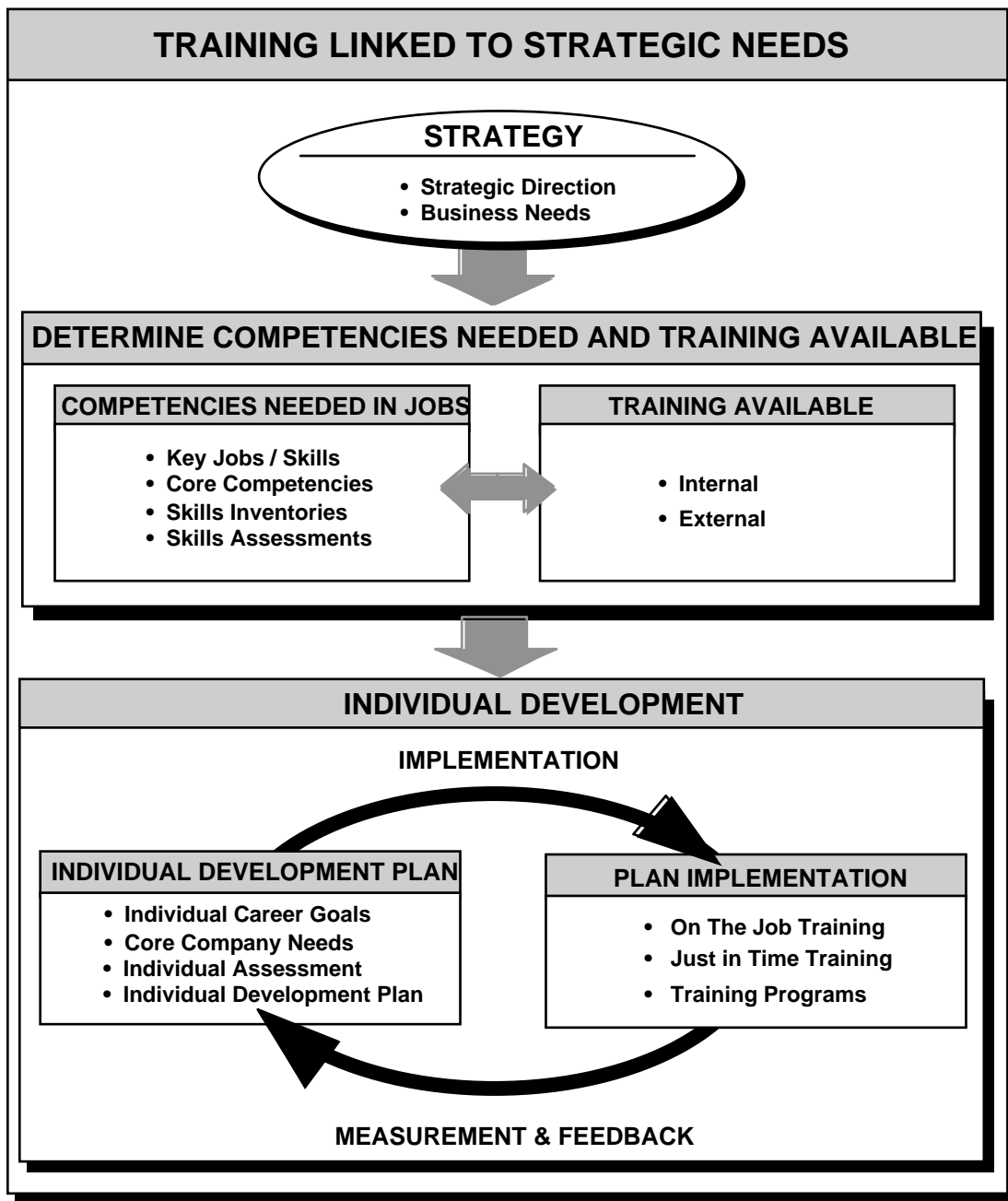
APPENDIX B — CHARTS AND GRAPHICS

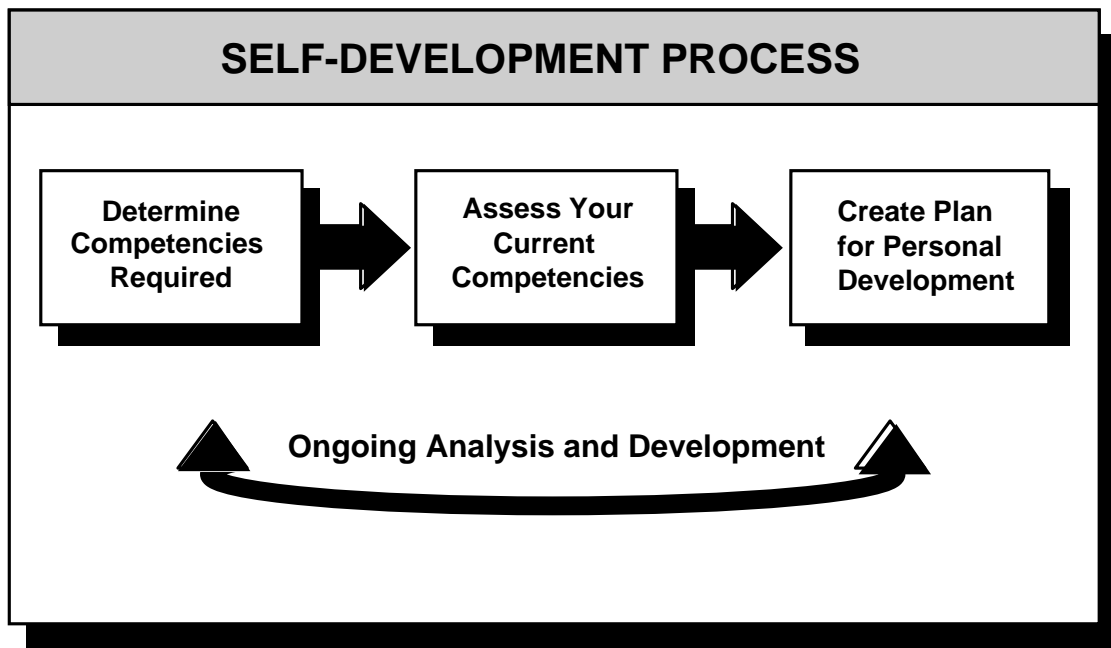
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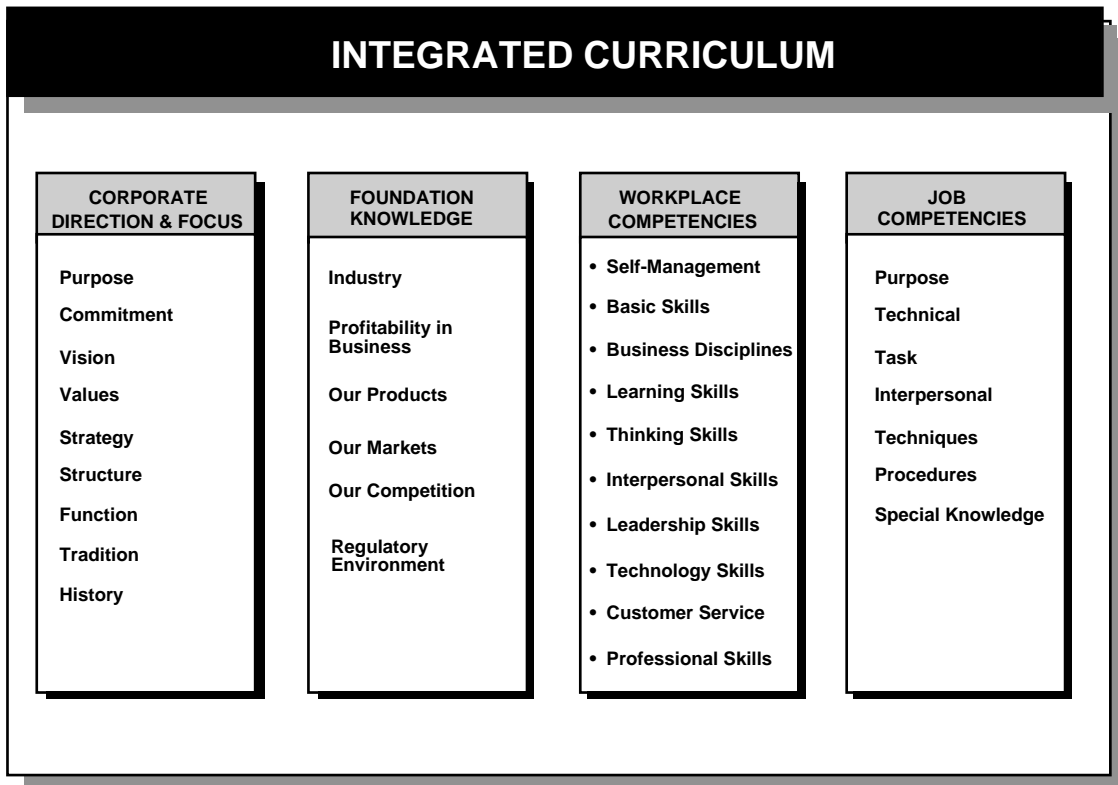
1. The New Employee Contract
2. Training Linked to Strategic Needs
3. Self-Development Plans
4. Integrated Curriculum
5. Workplace Competencies
6. Multiple Learning Opportunities
7. Expanded Role of Training
8. Integrated Database
9. Training Administration System
10. Centralized and Distributed Responsibilities
11. The Learning Environment Model
12. Enterprise-Wide Competencies
13. Sample Learning Environment Curriculum
14. Criteria for Training Program

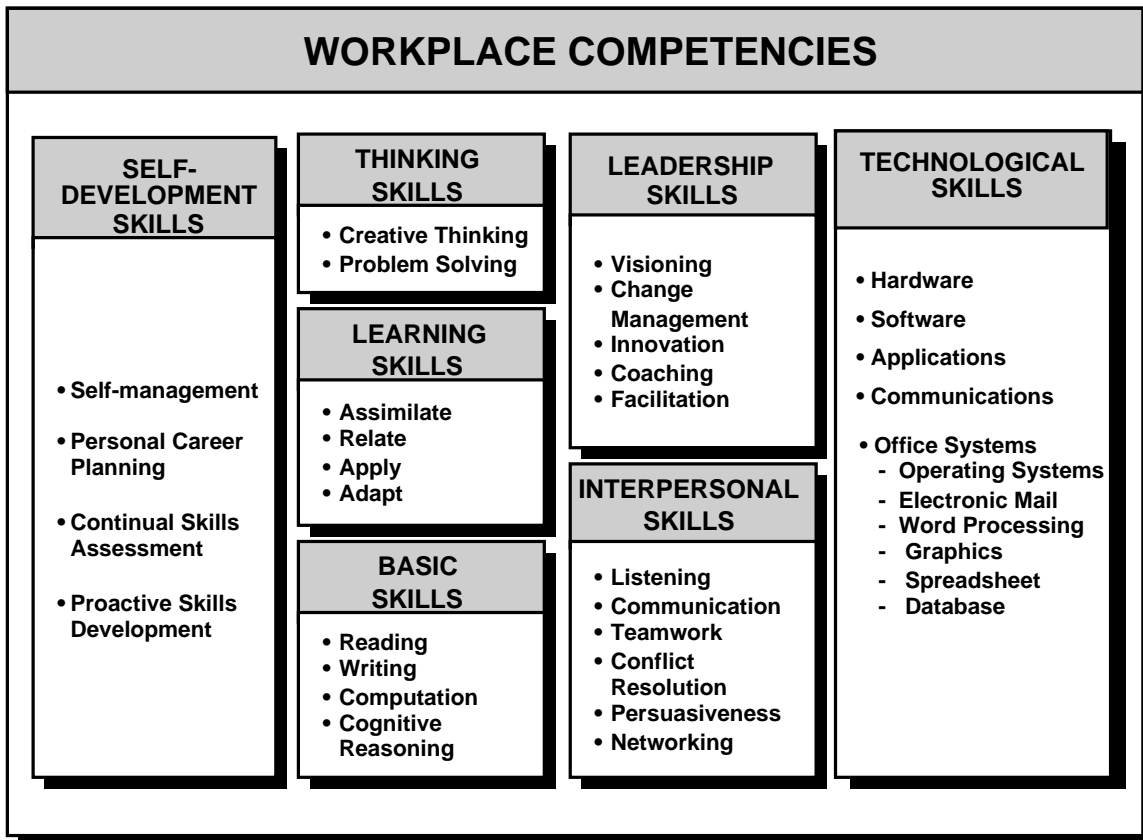
THE NEW EMPLOYEE CONTRACT

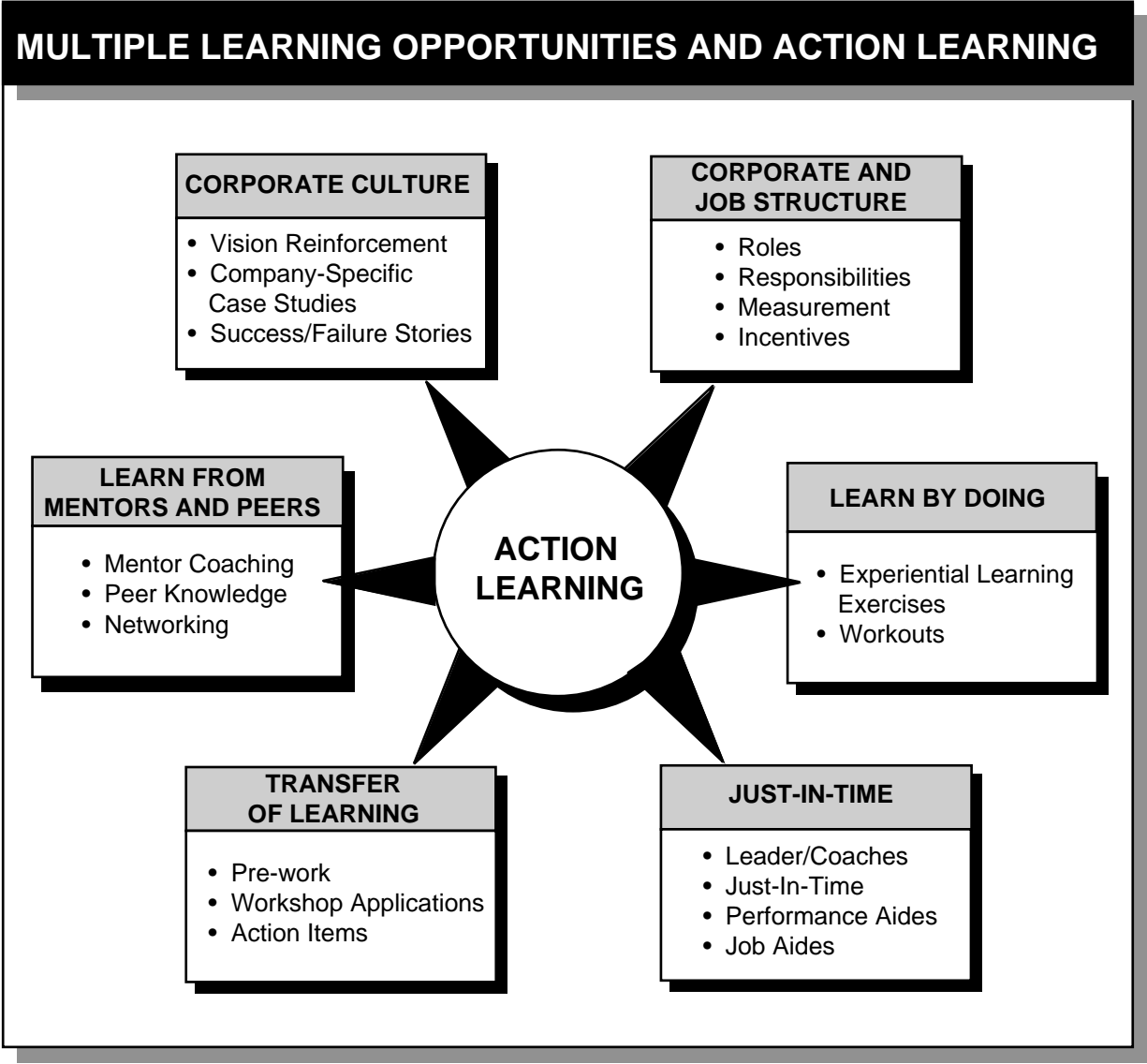






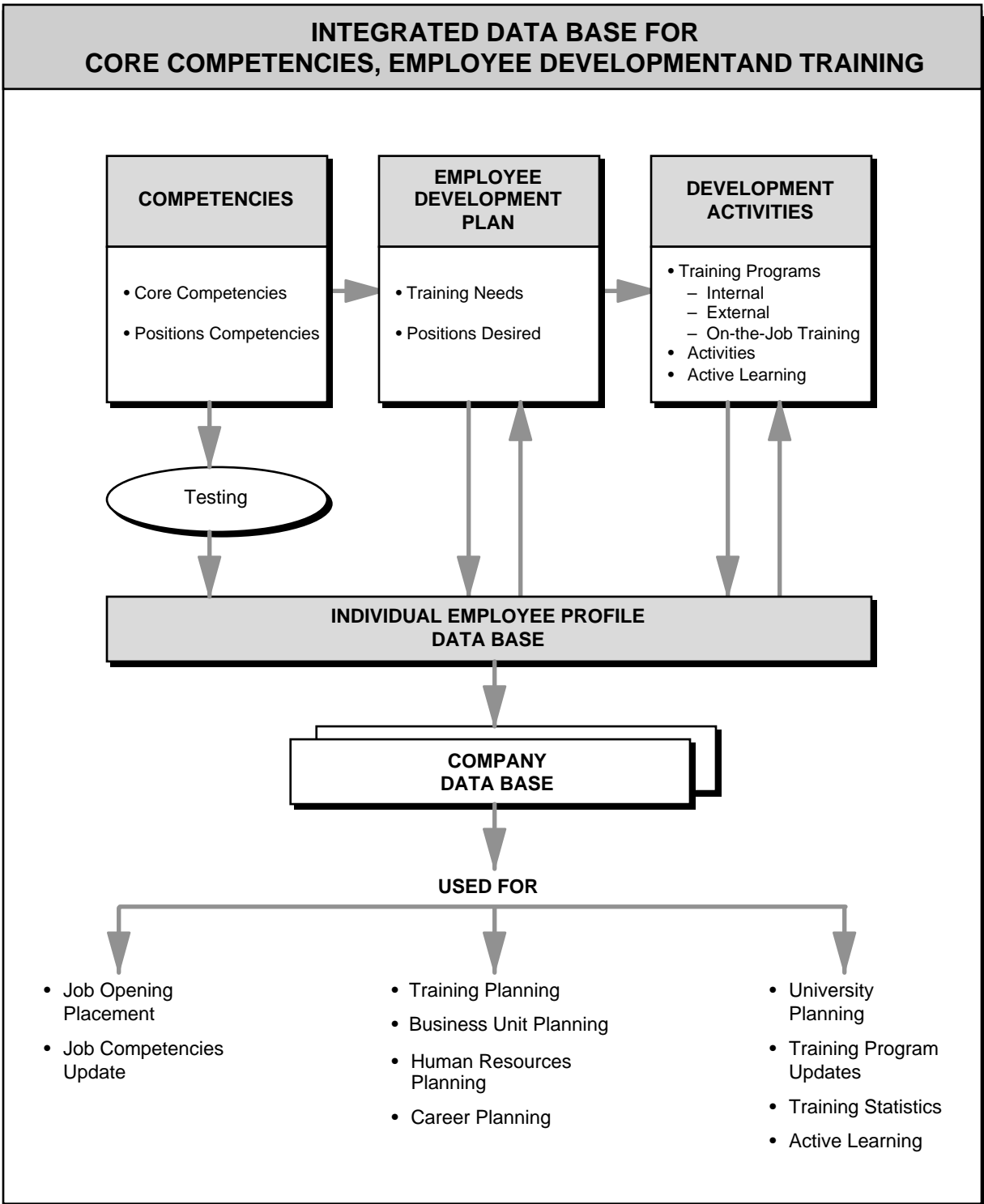




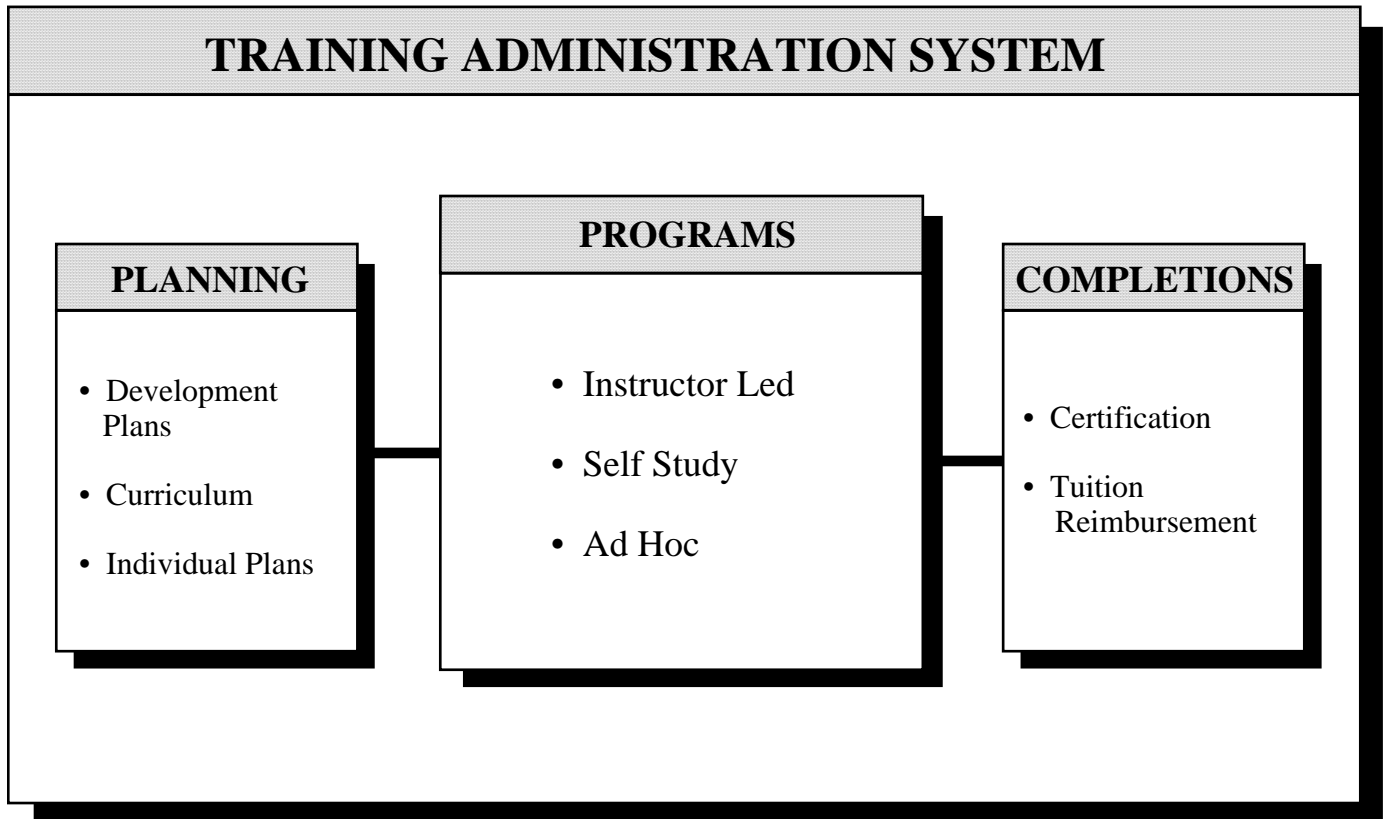


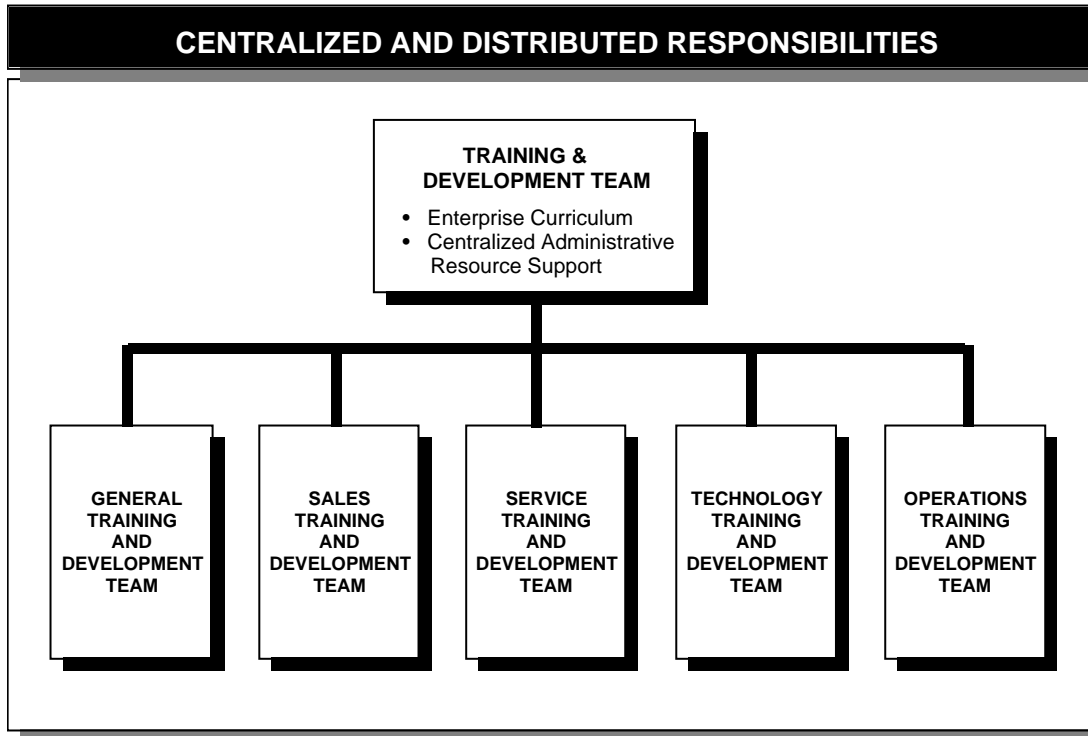
EXPANDED ROLE OF TRAINING IN A LEARNING ORGANIZATION

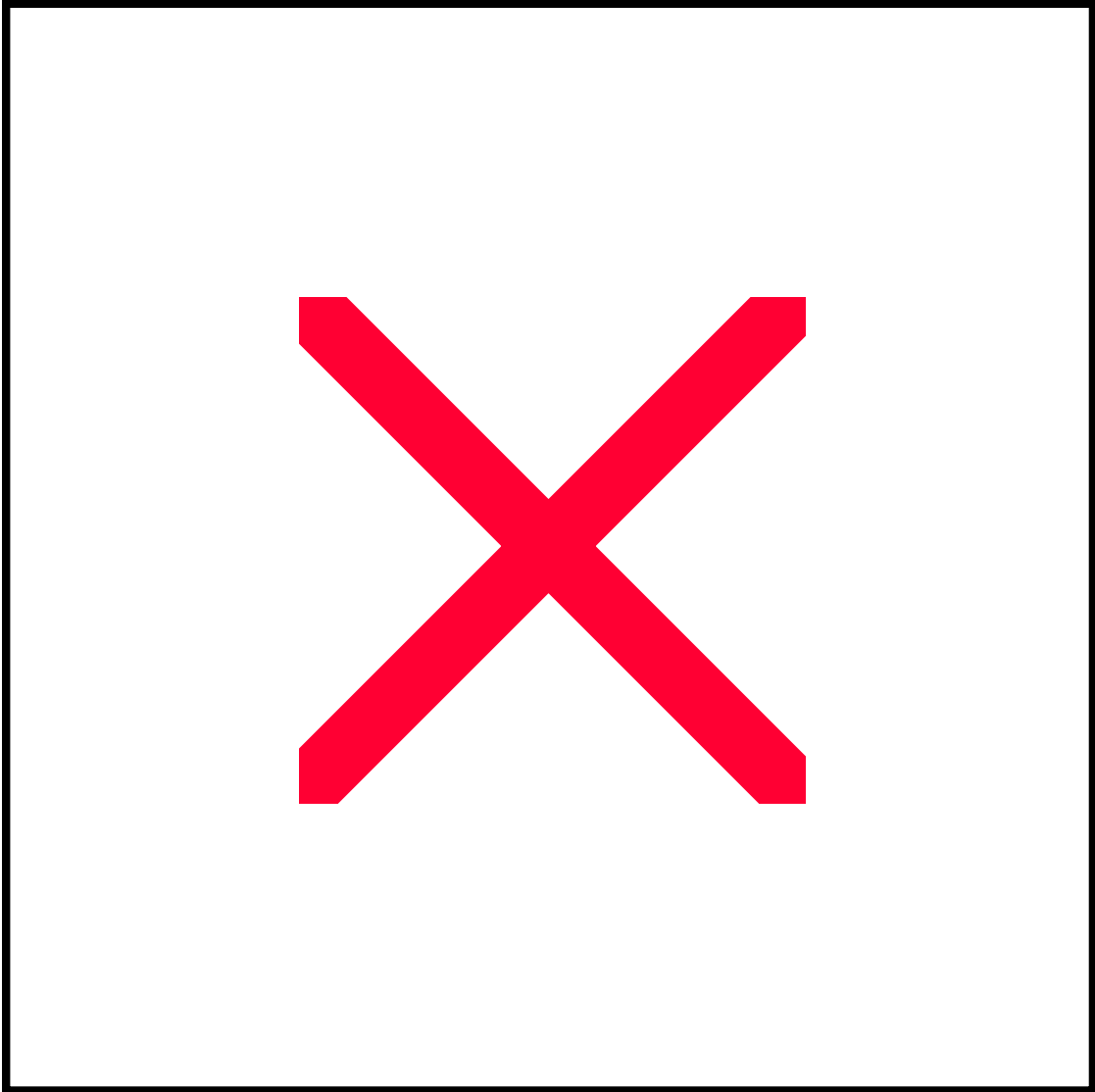
	MORE TRADITIONAL TRAINING ROLE		EXPANDED ROLE IN LEARNING ORGANIZATION
GOAL	Upgrade technical skills <ul style="list-style-type: none"> • Management skills • Selected sales and service skills • Selected job skills 	+	Help implement business unit strategy Build core workplace competencies
INITIATIVE	Training initiated Employee initiated based upon: <ul style="list-style-type: none"> • Personal desires • Personal interest 	+	Management initiated based on: <ul style="list-style-type: none"> • Organizational strategy • Skills needed Employee initiated based upon: <ul style="list-style-type: none"> • Organizational skill needs • Personal education plans
LOCATION	Classroom focus	+	Job focused Multiple delivery options <ul style="list-style-type: none"> • Self paced/OJT • Internet/Intranet • Leader/Coach • Classroom
DURATION	<ul style="list-style-type: none"> • One time • Event driven 	+	Lifelong learning process tied to: <ul style="list-style-type: none"> • Organizational plans • Personal plans • Career plans
CURRICULUM	<ul style="list-style-type: none"> • Management skills • Some sales and service skills • Technical skills 	+	Coordination/administration <ul style="list-style-type: none"> • Personal career plans • Personal career records Leadership skills Core workplace competencies Core professional competencies Business, job-specific competencies
METHODOLOGY	Learning by listening, practicing	+	Learning by listening, practicing, doing, networking, and role modeling Proactive self management
AUDIENCE	Internal employees (largely professional managers)	+	All employees <ul style="list-style-type: none"> • Management • Sales • Service • Operations Other members of the expanded team <ul style="list-style-type: none"> • Customers • Product suppliers • Educational suppliers



THE LEARNING
ENVIRONMENT







ENTERPRISE-WIDE COMPETENCIES

CULTURE

- Values
- Culture
- Tradition
- Customer-Focused People Skills

CONTEXT

- Industry
- Best Practices
- Customers
- Products
- Competitions

CORE COMPETENCIES

Core Skills

- Self-Development
- Basic Skills
- Business Disciplines
- Learning Skills
- Thinking Skills
- Interpersonal Skills
- Leadership Skills
- Technological Skills

Professional Skills

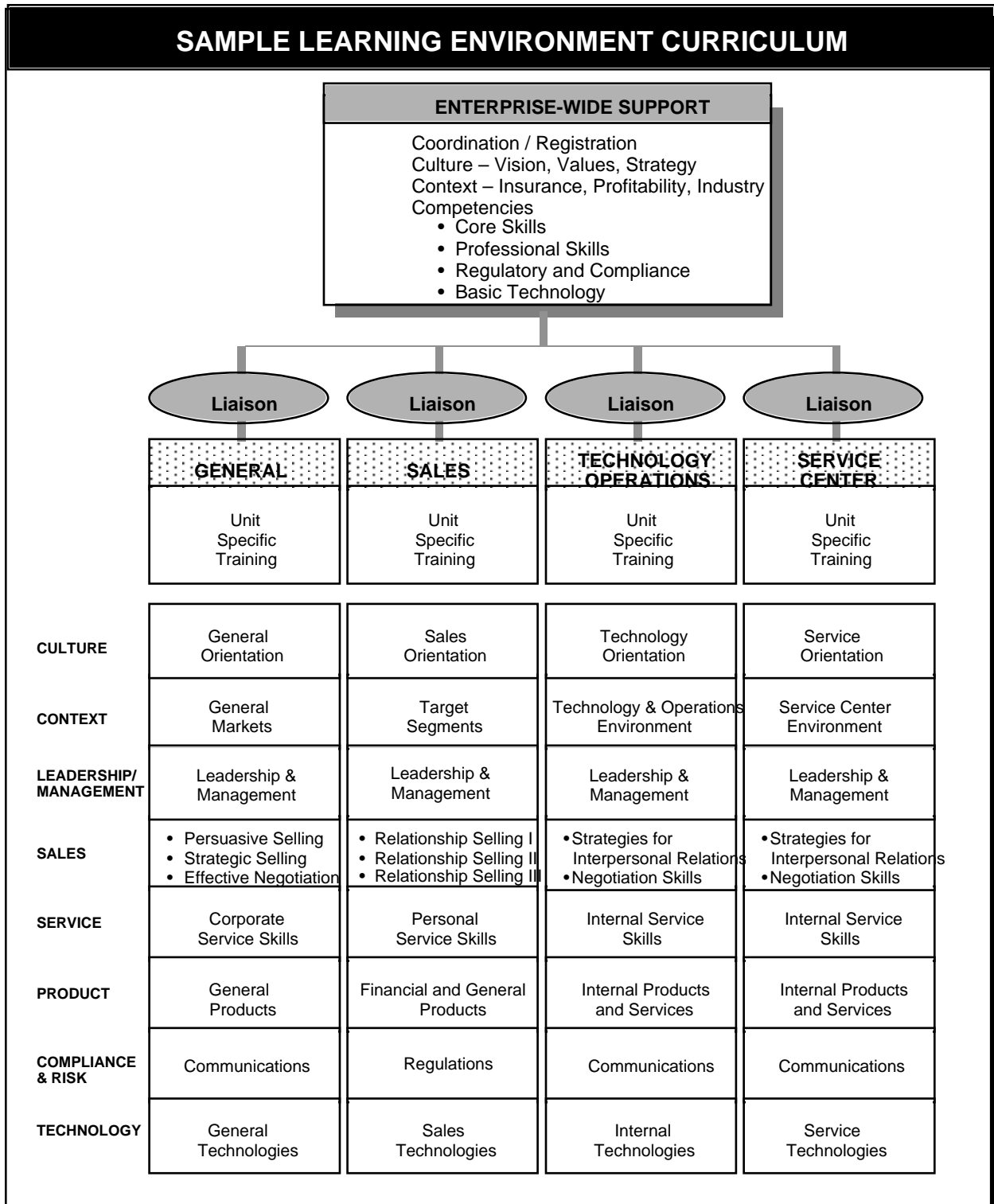
- Leadership
- Management
- Communication
- Teamwork
- Service
- Sales

Business Disciplines

- Personal Management
- Meeting Management
- Telephone
- Voice Mail
- E-Mails

Regulatory and Compliance

- Regulations
- Risk
- Compliance



CRITERIA FOR TRAINING PROGRAM EVALUATION

1. REINFORCEMENT OF CULTURAL MESSAGES
2. REINFORCEMENT OF BUSINESS IMPERATIVE
3. RELEVANCE TO JOB
4. FLEXIBILITY
5. SOUND INSTRUCTIONAL DESIGN METHODOLOGY

APPENDIX C

Merit's Workplace Competencies

MERIT'S WORKPLACE COMPETENCIES

A level of basic skills is essential for on-the-job productivity and efficiency. Merit provides the following courses to assist you in developing a well-integrated, comprehensive offering of training and development resources and developing your Learning Environment curriculum. **Merit** has training workbooks and leader's guides that can be used in-group sessions, or offered as self-paced training.

Here is a listing of **Merit** curriculum for various employee groups:

ALL EMPLOYEES

- Time Management Techniques
- Project Management
- Meeting Management
- Presentation Skills
- Effective Listening
- Strategies for Interpersonal Relationships
- Business Ethics
- Diversity
- Preventing Workplace Sexual Harassment

MEMBERS OF FUNCTIONAL TEAMS

- Creative Problem Solving
- Team Work
- Collaboration
- Empowerment
- Encourage Improvement
- Encourage Innovation

MANAGERS AND SUPERVISORS

Management Essentials and Supervision

- Recruit a High Performance Team
- Orient New Team Members
- Plan and Appraise Performance
- Train & Provide a Career Path
- Motivate and Compensate
- On the Job Training
- Tools for Building Employee Skills
- Working Together: Improving Labor Relations

Management Disciplines

- Communicating Your Vision and Mission
- Roles and Responsibilities
- Standards & Objectives
- Monitoring Performance
- Coaching for Optimal Performance
- Reinforce, Recognize and Reward Employees

MANAGERS AND SUPERVISORS, CONT.

Management Issues

- Diversity
- Business Ethics
- Preventing Workplace Sexual Harassment
- Employment Law Basics

Managing Change

- Managing Change
- Establishing Organizational Excellence
- Understanding Profitability
- Overcoming Negativity in the Workplace
- Effective Negotiating Skills

CUSTOMER SERVICE STAFF

- Telephone Skills
- A Positive Attitude
- Knowledge
- Identify Customer Expectations
- Excellent Service

SALES REPRESENTATIVES

Face-to-Face Selling: Consultative Selling Skills

- Relate to the Client
- Discover Client's Needs
- Present Solutions
- Resolve: Overcoming Objections
- Take Action

Strategic Selling: Account Analysis and Planning

- Prepare: The Key to Understanding
- Analyze: Step by Step Methods
- Strategize: Planning and Prioritizing
- Organize: Maintaining Contact
- Implement Your Plan

Territory Management: Market Analysis and Planning

- Develop a Marketing Plan
- Analyze Your Marketplace
- Warming Up Prospects
- Marketing By Mailing
- Control Marketing Results