

Creating Your Training Vision for 2011

Corporate Learning and Development

CapitalWave Inc. | White Paper

December - 2010



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Creating Your Training Vision 1: Organizational Strategy

Summary: In this series, we will examine the steps you can take to create your training vision and strategy for the upcoming year. One of the first aspects of strategic planning is to take a hard look at your organization and its 2011 strategy.

As we move toward a new year, you will probably begin thinking about what you need to accomplish next year. But this list should be more than a set of objectives or goals – your plans for the upcoming year should take the form of a vision and strategy that can help your organization meet its goals. In order to do this, there are a few steps you should take during your planning process. The first step is to look at the organization as a whole and determine what the strategy will be for 2011.

As the economy emerges from recession, organizations are still slow to spend money or expand out of fear of the dreaded “double-dip.” Because of this, it is even more important that you start your strategy plans with the overall strategy of your organization. This may seem like a great undertaking, but if you approach it systematically it is manageable. First, determine who the strategic players are or are going to be for the upcoming year. For example, one firm may have discovered a technical problem with a major product, so key players are going to be IT, development, marketing, and potentially the sales force.

On the other hand, if your organization is one of the brave ones that is moving forward with market or product development for 2011, the key players will most likely be marketing and sales. Once you know who the key players are, you can take the time to speak with managers

or directors in those areas to find out what’s going on.

The next step to take is to break the organizational strategy down into manageable areas, such as innovations, initiatives, technology, growth, and finance. For example, initiatives may cover product and market development or may even cover the correction of technical problems. On the other hand, innovations could be big changes in the way the firm does business, major product changes, or internal changes such as a move to a new HRM or ERP system. Technology will most probably touch most of the areas for organizational strategy, but technology can stand on its own, as well. Keep in mind that changes to processes, such as sales, may also have a technological aspect. Growth and finance may also appear hand-in-hand. For example, the organization may be planning to take on additional market share, expand into new markets, or pursue a joint venture with another firm. Any of these moves will require the assistance of your training department.

In more general terms, consider how all of these aspects will work together to create the calendar and project plans for the organization over the next year. Plug in the key people from each area and you have a list of interviews to conduct. When we discuss meetings, remember that the idea is not to get the nuts and bolts for every initiative at this stage.

What you will want to find out is the overall impact of the project, how the project or change will affect the overall goals of the organization, and of course you will want to have an idea of the timeline for each piece.

When you have all of this information compiled, you are one step closer to determining what your strategy can be. But remember that

whatever plans you have for the training department, which we will discuss shortly, should mesh and match with the overall plan for the organization. This is especially true in the current economic environment, where the training budget can still be an issue of contention in the financial plan. Every action you take in 2011 should be for the express purpose of supporting the organization and its overall goals for the year – and you should be able to show unquestionably how your department will be able to do this.

Next, let's examine the overall industry to determine the trends and initiatives that will affect your organization and your training department.

Creating Your Training Vision 2: Industry Strategies and Trends

Summary: As you plan your vision and strategy for 2011, it's important to take a look at your industry in general. Let's discuss why and how.

As training professionals, we have to remember that our industry covers not only the industry of our firm but also the industry related to training and development. And both of these areas can have an impact on your strategy for the upcoming year. The second step in planning your training vision and strategy for 2011 is to look at both areas in terms of trends and changes.

On the industry and organizational level, you may wonder why it's necessary to look at trends when your organization's executives may make decisions based on those trends. First of all, you may be able to see trends and changes in the industry that will change the way your organization conducts business from a different perspective, that is, the perspective of a training manager. Often organizational changes in

response to the industry overlook the training aspect, so you can be better prepared for what's coming. In relation to training and development, obviously any trends or shifts in the way training is designed, delivered, or managed can be used to the organization's advantage.

One of the best ways to examine overall strategies and trends is through your professional network. Ask your colleagues what they have going for 2011, both within the industry and within training and development. Find out what new technologies are being deployed and how they are being used. Obviously if you are dealing with a colleague from a competing organization you may not get the details, but you may be able to obtain an idea of where firms are headed. In terms of training and development, it often seems that training professionals are willing to share their uses of technology and training trends with colleagues, so ask questions of your network and form a picture of how training is going to develop in the upcoming year.

Another way to look at strategy is to benchmark similar organizations. Keep in mind that similar may mean in the same industry or same group of industries, but it also may mean the same size training departments or similar training deployments. Benchmarking may be formal or informal, so your informal benchmarking may come when you work your network for upcoming trends. However, don't be afraid to conduct some formal benchmarking, where you contact training leaders in similar organizations to determine how they are managing training now and in the future.

You can also take a closer look at industry publications, both traditional and online. Let's face it: sometimes the latest publication issues

end up far down the list in our email inboxes or stacked under paperwork on our desks. For the next few weeks, take special care to read these publications in order to detect trends in both the industry at large and the industry specific to your organization. Use your intuition to list common elements and common trends. In fact, you can use the information you find to work with your network or undertake benchmarking studies for the upcoming year.

As you are “studying” the industry, try to separate trends from “trendy,” especially where technology is concerned. Spending for training has to be undertaken with even more care than in the past, so you want to come up with ideas that truly match industry trends and will truly last long enough to show a benefit to the bottom line. In addition, when dealing with your industry, try to discern between temporary “blips” and those trends that are here to stay. This may be difficult, so you may want to ask your executive sponsor or team for input as you work through trends and changes for the upcoming year.

The idea with industry strategy is to obtain a picture of where the training industry and your specific industry are headed in the upcoming year. You may find a great deal of useful information, or you may find that the information you uncover simply helps you understand general trends and where your organization is in relation to those trends.

Next, we will move back into our own organizations to determine what our “best” training customers are planning for 2011.

Creating Your Training Vision 3: What Are Your Best Customers Planning?

Summary: Training in the current environment is very much like sales, so it is absolutely

necessary to find out what your best internal customers are planning for the upcoming year.

In the current environment, it’s a good idea to manage your best internal customers just as a sales manager would manage that pipeline. As part of your planning process for 2011, you will definitely want to make contact with your internal customers to find out what they are planning for the upcoming year – and why. And even more importantly, this contact serves to solidify your relationship as a solutions partner and not just a service department. By discussing the upcoming year with your closest customers, you may even begin to see the overall organizational picture before anyone else does – and with this information you can certainly determine how your department will help the organization move forward in 2011.

The way you approach this discovery process will depend on how large your customer base is and how many of your own staff members can handle the process. To start with, you may want to devise a brief survey for key personnel, in which they provide a little information on what initiatives they are planning for 2011. Within the survey, provide an opportunity to rank upcoming initiatives and describe the expected outcome. Also indicate that you plan to follow up with a personal meeting. In that regard, the survey is simply a method to get both you and your customers into a strategic planning thought process. There really is no substitute for meeting with your clients personally, or at least via a web conference or phone call.

When you do meet with your customers’ key players, avoid making a drawn out attempt to plug in every point where training can help achieve goals. There will be time for this later. But the purpose of the meetings is to gain an understanding of what each customer has on

tap and to begin to formulate a picture of how you can help. Keep in mind that there may be areas that are out of reach for training. In addition, be aware that there may be other initiatives that are more important to the overall success of the organization for the next year. This means that it's a good idea to avoid making any promises. If you've sent some of your other staff members out to meet with customers, take the time to come together in person in order to discuss any overlaps or opportunities that may spread across departments or functions. Sometimes one of your customers may see only his or her part of the big picture because it is vitally important. If you and your staff look for trends, you'll be able to see which initiatives affect which groups.

Depending on the number of internal customers you have, you may end up with a great deal of information. One way to begin sorting through it is to eliminate the areas where you may not be able to help out at all. For example, a small department may be changing its processes or policies. If that change is local, as in it does not affect a larger group, and the department has a handle on it without your assistance, go ahead and put that initiative on the back burner. Keep up with your client in order to determine how the initiative is going. Remember that small changes sometimes inadvertently turn into big ones. Next, make a "pile" for potentials. These are the initiatives that may need a consultation or a push in the right direction, but may not need a full-scale training intervention. Finally, create a list of initiatives that you know will involve training on a large scale and begin to add those to your mental task list.

The items that make it to that mental task list will be the ones you want to start thinking about, especially in terms of time, human

resources, and training technologies. Even more importantly, begin to formulate an idea of how training can impact those initiatives along with the organization's bottom line.

As you mull over your mental task list, let's turn our attention to your department and your vision for it in the upcoming year.

Creating Your Training Vision 4: The Training Vision

Summary: Now that you have assessed the organization, the industry, and your most important internal clients, it's time to take a good look at your vision for the training department.

You have assessed the organization in general, both the industry related to your organization and the training industry, as well as your internal customers. You may even begin to see a picture of how 2011 will be shaping up for you and your team. But before you make any solid commitments to a vision or a strategy for the upcoming year, it's a good idea to create a training vision that is independent of your assessments. As you create this vision, you'll be able to use your imagination and innovation to come up with a "wish list" of sorts. The main caveat in this type of planning is to remember that it is a wish list and that not everything on your list will become a reality. You may even want to involve the training staff in a brainstorming session, as each member of your staff is probably interested in a different training industry discipline.

For the brainstorming session, consider disclosing the caveat we just discussed, so that the staff can be aware of the fact that the brainstorm is a wish list. Consider using a conference room or large office with flip charts to record the ideas that surface. If possible, you

may also want to share the results of your assessment with the training staff if they aren't already privy to the information you've uncovered. In addition, try to break down the areas of consideration to organizational initiatives, technology, growth, methods, and even finance. And don't forget to include your own vision for the future, either.

The organizational initiatives that you've uncovered can lead the discussion, or your thought process if you are working alone, to a vision for the upcoming year. It may be as simple as a vision to support certain initiatives with certain results. On the other hand, technology can lead to a great deal of strategy for the training department. For example, you and your group may want to begin using a new development tool for online courses and computer-based interventions in the classroom. Or, you may want to begin using social media as part of the training interventions in certain subject areas. Technological vision may even include a new learning content management system.

A discussion or thought pattern on departmental growth may come naturally with the kinds of innovations you see as part of your vision for 2011. For example, if you see that the most important organizational initiatives are going to tax your department beyond its abilities, you may need to place growth on the priority list. In an upcoming discussion, we will explore the creation of the execution strategy, so this is one of the items in that execution.

Training methods can cover both the design and delivery of programs, and this needs to be part of your discussion for the 2011 strategy. Many times the overall initiative that is causing the need for training may determine delivery and design methods. For example, changes in the

product strategy may require classroom delivery and training so that participants can practice their customer procedures. On the other hand, if your organization is advanced, you may be able to create this training in a web format.

Finally, the financial aspect will be part of your vision for 2011. If a new technology is simply too expensive, you may be able to come up with a workaround immediately. If you're not sure, it may be a good time to design two or three options at different cost levels. Although the budget can be a sensitive issue, you may want to consider having the staff help out on estimating costs and producing viable alternatives. This way, when you've defined the vision and are ready to obtain funding, you can easily say what your department can do at various cost levels. The idea with brainstorming is to come up with the overall direction and strategy for the training department for 2011. When you have finished this exercise, you will be able to formulate a vision and strategy for the upcoming year. This vision and strategy will be solid enough to present to your executive sponsor and to the financial officer if funding is involved.

The next step is to define the vision and determine if it fits with the organization's overall expected movement.

Creating Your Training Vision 5: Defining the Vision and Determining a Fit

Summary: Now that you have brainstormed your ideas for the vision and strategy for 2011, it's time to tighten the vision and determine if it fits in with the overall organizational initiatives.

The results of your brainstorming session are in: either on your own or with your staff, you've decided on the most important components of a vision and strategy for training in the upcoming year. In some cases, you've even developed a variety of options or choices for the vision and its implementation. Now it's time to create a true vision for the training department for 2011 and create a strategy to go with it. Let's look at determining the fit and then we can look at how to develop a vision and strategy.

You essentially have two sets of information: the information you've obtained from your assessment of the industry, your organization, and your customers, as well as the information you've gathered from the training department internally. How do you know if the two are a fit?

First, look for components of your vision that fit directly with the initiatives that you will be impacting over the upcoming year. For example, if a new CRM system is being implemented, your choice for using a simulation software such as Captivate to develop tutorials is probably right on. In fact, you may be able to pilot the simulation software with a key project like a CRM system implementation. On the other side of this, if many of the organizational initiatives involve the need for classroom training that is heavy on personal interaction, this may not be the time to look at rolling a simulation program. But don't forget to consider the alternatives. The high level of interaction could be great cause to roll out a web conferencing system and program for training. The comparison of these two sets of information will begin to create your strategy.

But what about the creation of a vision? Keep in mind that a vision statement simply describes why your department or organization exists. In

fact, you may already have a general vision statement for your training department. But this doesn't mean that you can't create a vision statement for the upcoming year. Plus, your vision for the upcoming year does not necessarily have to be a "vision statement" in the truest sense of the word. Your vision for the upcoming year should serve as a guide as well as a reality check as the year progresses and projects and initiatives change. For example, if your organization is making heavy changes to customer management for the next year, one of your vision statements for 2011 could be to support the goals of customer management for 2011. Your vision statements can focus on your department, as well. For example, if you know that 2011 is the year for innovation in training, make this a vision statement. The idea here is to create a set of statements that keep you and your staff on track, especially as things become nebulous.

Once you've created this vision, "connect" it to your department with a strategy. For example, which projects come first and which ones are going to be year-long components of your work? If you're not sure how you will be able to assist in some of the major initiatives, it may be time to create an assessment strategy. Consider the CRM initiative we discussed earlier. This is literally an earth-shaking initiative, so in order to figure out where to start part of your strategy will be to assess the departments that are involved in literally to get involved with them as the project develops. As you are developing this strategy, you'll begin to see pieces of it falling out, due to lack of human resources, financing, know-how, and technology. Be sure to note these items, because our last discussion in this series will be about the nuts-and-bolts execution of the vision and strategy.

Now that the vision and strategy is laid out, does it fit with the organization as a whole? Most likely it does, because your planning has centered around the organization and its initiatives. If there seems to be a disconnect, go back to your vision and strategy in order to make corrections.

Next, we will examine the creation of the execution strategy.

Creating Your Training Vision 6: Execution Plan

Summary: You have a vision and strategy for training in the upcoming year and it's taken quite a bit of time, assessment, and brainstorming. But the best strategy is useless unless you know how to execute it.

Visions and strategies can fail easily if there is not a solid plan for execution, especially if you need to present the vision and strategy to a decision maker. Also, when it comes to being a visionary and innovative training manager, it is absolutely necessary to think through the "how" by circling your strategy at a very low level. You may be able to do this alone, but if you have a training staff this is another time to bring them into the planning process. Many times the people who execute every day can see things that you might miss.

When it comes to your vision, remember that this statement or group of statements serve as a guide and a reality check for the upcoming year. But you translated your vision into a strategy, so the strategy should be your focal point for execution. As a training manager, you should also be able to put together a mental picture of the execution components as the vision and strategy are being discussed and brainstormed. To adequately plan execution, look at your strategy from the standpoints of

technology, human resources, physical resources, "buy in," and finance.

In terms of technology, you may already know what components are missing in order to execute your strategy for 2011. For example, if you know you need to add technology such as Captivate or Articulate, this should produce a blank line for human resources and finances. But don't forget about other technological aspects of execution. Is the staff hardware and software adequate to add technology? Will you need to expand PC memory, screen sizes, or capabilities in order to add design technology? If you are planning a technology that affects the entire organization, now is a good time to involve the IT people. All of these components will create a technical execution plan and will also contribute to your human resources and financial execution plan.

Next, examine intellectual capital, or know-how, in both the training organization as well as the organization as a whole. Determine what knowledge needs to be added or modified in order to execute your strategy. For example, if you are planning to implement a web conferencing tool, is the administrator or instructor going to need training in addition to the users? Or can a quick reference guide work for the general population? Within your own training organization, do you think it will be necessary to send your developers to classes so that they can learn a new program, or do they have the ability to "pick it up?" Remember when you are examining the technical aspects, look for bundles of products and training in order to present the most cost-effective technical upgrades for the training department.

The discussion of intellectual capital may lead to your human resources capabilities. In order to execute your strategy, are you going to need

to add staff? Is there a potential for this, or should you suggest outsourcing to contractors to begin with? Another way to look at human resources is to consider “insourcing,” that is, changing skill sets in order to change job responsibilities. For example, if you have an instructional designer who has a high level of technical ability, you may simply need to train him or her to take over a new job function that deals with your new technology. Or perhaps you have an instructor who has expressed an interest in content development. This could be a great time to begin thinking about how to develop your existing staff without asking for cash to add resources.

Financial concerns will probably make themselves known throughout the execution planning process. Be sure to know how much you need, what the purpose of the money will be, and most importantly what the “payback” will be. In other words, training can no longer simply exist – it is necessary to prove your worth by providing a cost benefit for every dollar.

With all of this information pulled together, create a step-by-step business plan that explains your execution strategy. This plan can also serve as a guide and a reality check as the year unfolds. But more importantly your business plan proves to the decision makers that you have considered every angle, that you have alternatives, and that you know exactly what you can deliver in the upcoming year.

For our final step in creating a training vision and strategy for 2011, we will examine how to present your plan to executives and decision makers.

Creating Your Training Vision 7: Presenting the Vision and Strategy

Summary: You will most likely have to present your training vision and strategy to your executive sponsor and possibly to a financial executive, as well. Let’s examine some ways to effectively present your vision and strategy for 2011.

If you’ve taken the time to create your vision and strategy for 2011 as well as an execution plan, you should also take the time to plan how to present these components effectively. The presentation of your vision and strategy may be a cursory nod from a fellow executive or it could be an approval process from an executive sponsor. Plus, if you need financing you will most likely have to go before the financial officer or executive. There are two different focuses here: business and finance. For business, you will need to be able to explain how the training department will support the organization and its initiatives for 2011, as well as continue to support your best customers. In the financial realm, you should be able to show how any expense on training will benefit the bottom line. But how you present these items depends on the personalities and functions of the people to whom you are presenting.

If you’ve done your homework, your executive sponsor should be the easiest to persuade in terms of your vision and strategy for 2011. With this person, focus first on the assessment you’ve made of the organization, its industry, and your best customers. There is no need to go into detail about your assessment of training industry trends unless you are asked. Help your sponsor understand that everything you are presenting has a business purpose and can support the organization in the upcoming year. But on top of this, pick out some of the

elements of your vision and strategy that may have a longer-lasting effect. For example, if you are using web technology to deliver sales training, consider how this innovation can change training in the next two or three years. Your task is to show that innovation goes beyond a reactive need. Remember that your executive sponsor is probably going to be your advocate – a cheerleader for the training cause. So be sure to answer all of his or her questions clearly and with a business purpose.

Explain your execution plan and also point out the areas in which you are saving time or money. Let's say you've decide to "insource," that is, change existing employees' skill sets to match the new strategy. Point this out and explain that it saves a hire and a learning curve, and that it encourages retention of your best staff members. Once your sponsor is on board, you'll need to move into the financial area.

As you probably know, some American organizations are sitting on a mountain of cash as the economy improves. Most are interested in insulating themselves from another recession, so convincing a financial officer to spend money on training will be difficult. The main idea to remember is to frame all of your requests in a financial standpoint. Obviously you'll have to explain the cost of each item, but each item should also have a potential pay back. In addition, each item should, in some

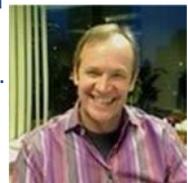
way, support the organization and its overall goals.

We've already discussed alternatives in your vision and strategy for 2011, but you must decide how to use them. For example, if your executive sponsor or financial officer is always interested in innovation, you may simply want to present the ideas that are the most innovative, regardless of cost. Then, if you are asked about alternatives, you can present them. But if your executives are the types that appreciate options, you'll need to present all of them for each initiative. The key when presenting options is to focus on what you and your department can do and not what they "can't do." In other words, explain that option one allows X result, option two allows X result, and option three allows X result. And each result should be tied to an organizational initiative and goal. The benefit of presenting options is that it shows you are flexible and able to work within the confines of a given situation. When the economy continues to improve, your decision makers will probably be more likely to give you exactly the financing you need if you prove your flexibility.

After your vision and strategy for 2011 are approved, remember to keep in contact with your clients, to use your business plan as a guide and a reality check, and to closely manage human resources for execution.

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Bryant Nielson – Strategic Alliance & Acquisitions Director at [Financial Training Solutions](#) a division of [CapitalWave Inc](#) – offers 20+ years of training and talent management for executives, business owners, and top performing sales executives in taking the leap from the ordinary to extraordinary. Bryant is a trainer, business & leadership coach, and strategic planner for many sales organizations. Bryant’s 27 year business career has been based on his results-oriented style of empowering.





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