Dealing with Constraints in Corporate Training

7 Common Solutions to these Constraints

CapitalWave Inc. | White Paper

October 2010

CapitalWave Inc.
Training Solutions for the Financial and Human Markets

FinancialTrainingSolutions

Table of Contents:

Training Constraints 1: Time

Summary: In this series, we are going to examine some of the common constraints we face in corporate training and how to deal with them effectively. One of the most common constraints when it comes to corporate training is time. Let's examine how time becomes a constraint and how you can effectively use time issues to your advantage.

Corporate training organizations are usually "under the gun" when it comes to time. Stakeholders, division heads, and subject matter experts (SMEs) want what they want when they want it - and this is most often an understandable issue. After all, the organization's ability to meet its goals is almost always based on a time constraint of some kind or another. Let's look at how you can be faced with a time constraint as a corporate training manager - and how to deal with those constraints.

One of the first things to consider is your ideal training project placed within an ideal timeline. In that ideal timeline, what training milestones do you want to include? For example, you would most likely want to start with a full needs assessment to ensure that the content addresses the performance issue. Next, you would want to include plenty of development time, that is, time to conceive the training programs, methods, measurements, and evaluations. Along with that development time, you would probably want to include enough design time to allow the development staff to write and perfect content, develop instructional tools, proof those tools, and maybe even run them by an SME or two. Before you deliver the program, especially for classroom programs, your staff would need "train the trainer" time as well as a lengthy pilot to ensure that the training is effective. Even with online interventions, you would want to take some time to pilot to a sample of the target audience and have them test each piece of the course. In addition to all of this, you would want time to review the results, make changes, and then go to general release. But how many projects, especially in a corporate environment, allow us to hit every single one of these milestones? Probably not many. But the trick is to examine what the project entails and choose the right milestones.

For example, if the stakeholder or department head tells you that they need training on a certain process, procedure or system, it may not be necessary to assess that need. In fact, if the stakeholder can provide an SME who can provide content, then it may be better to move on based on their expertise. With this approach, you can spend more time on the design, piloting, and evaluation of the training program. On the other hand, if your stakeholders cannot provide an adequate picture of the problem, then you obviously need to spend the bulk of the timeline on assessment while shaving time off of the other milestones. In this case, once you know the problem, you can put the project into "overdrive" to get it developed quickly and within the time constraint you've been handed. Many times a "just-in-time" intervention can be effective and solve the problem, and also create a "placeholder" for further development and perfection in the future.

When you are faced with a time constraint, the negotiation of a project can come down to a good old-fashioned compromise between the training organization and the stakeholder. One of the first ways to deal with this is to analyze the situation as we've discussed and then offer an alternative timeline. Keep in mind that stakeholders or division heads may come up with a timeline as a first blush because it is the quickest route to the solution. In cases like this, the decision maker may be open to a timeline that is a little longer - as long as you can deliver what they need.

If there's just no compromise, determine within the training organization what you can deliver in the time allotted. For example, you may have had plans for an elaborate online case study program to be delivered before a classroom program begins. If you simply will not have time to create the online intervention, then move that to a written case study section that will be part of the classroom course. This will shave time off of development while still delivering necessary components.

Next, we will discuss another common corporate training constraint, budgets.

Training Constraints 2: Budget

Summary: It's very difficult to get through a fiscal year in corporate training without running into a budget constraint. Let's discuss the kinds of constraints you may encounter and some ways to deal with them efficiently.

Budget constraints are common in corporate training, especially during periods of financial uncertainty. And any phase of a corporate training project can be the victim of a budget issue. Staffing is a typical budget constraint, in which you are told that the money does not exist to add staff when it is almost certainly necessary. Organizations also cut budgets for materials or training methods, such as online delivery tools. You may even see the money cut off for delivery, such as locations or number of times programs are delivered. Let's take a close look at each of these categories of budget constraint and find ways to work around them.

Staffing budget constraints are sometimes the hardest to break through. After all, adding and retaining staff is the most expensive part of running a corporation. And with this heavy price tag, training managers are usually put in the position of having to prove that staff needs to be added in order to cope with a higher workload. One way to work around this constraint is to ask for contractor money. Hiring contractors does not have the same price tag as hiring a permanent employee, and the money is not something that is used for the entire fiscal year. If you can get a contract budget, keep a record of what your department accomplishes with the extra help. When it's time for a new budget, roll out your accomplishments as proof of the need. Another way to deal with a staffing budget constraint is to determine what you can accomplish with the current staff and offer that as an alternative. It's worth a try, but if that doesn't work, consider retooling the existing training staff to meet the need. For example, you may have instructors that can double as instructional designers until they are needed in the classroom.

When the budget bottleneck comes to materials and training methods, there are some creative workarounds that also may prove your genuine need. For example, most vendors offer free trials of their online development tools. Get the free trial, develop a top-notch training piece, and go to the table with the proof. If a decision maker can see the final product and its effectiveness, he or she may be more likely to find the money to fund the purchase. If the constraint is related to training materials, be creative. Consider using three-to-a-page PowerPoint printouts instead of handing out the entire presentation, and do them in black and white. Or, consider putting job aids online instead of into a print format. What about creating training that can make a profit? For example, you may be able to sell training programs to clients or other organizations within the industry. The key here is to analyze the material need and determine what alternatives exist. And don't forget to keep a solid record of the amount of money you save - or make.

Delivery constraints may be the easiest to get around. If the issue is delivery staff, consider using a well-developed designer to deliver training during the height of the need. Also, delivery is another good use of contract money for special projects or projects of limited duration. If the issue is location, analyze the cost of renting space for the delivery. For example, you may have a large-scale delivery that must take place in a certain amount of time. Instead of doing numerous small training programs, consolidate it into a couple of large ones. In some geographic areas, hotels are in desperate need of conference center business and may even offer special rates.

The overall key in dealing with budget constraints is to analyze the situation and come up with either cost-free or less expensive alternatives. But secondary to this is the absolute necessity of keeping up with accomplishments based on the lower costs. In many cases, you may even convince yourself that using contractors during peak need is the best way to go instead of adding staff. Or you may decide that renting space for delivery once a year is more effective. On the other hand, your financial decision makers may see that you have a genuine need and increase the budget for the training department.

Since staffing is related to both time and budget, we will look at that corporate training constraint next.

Training Constraints 3: Staffing

Summary: Staffing constraints in corporate training can be related to both time and budget. Let's take a deeper look at staffing constraints and how you can deal with them efficiently.

We've already discussed how a staffing constraint can be related to budget issues. We've also discussed how that staffing constraint can create problems when it comes to project timelines and deliverables. In simple terms, a lack of budget can mean a lack of staff, which means an additional time constraint within the overall timelines. But a staffing constraint does not have to mean the end of a project or a last-minute request for additional funds. In today's environment, staffing can be mobile, that is, people do not necessarily have to be linked to one job function. The key is to examine your staff, their areas of responsibility, and their abilities to make a determination for multi-tasking. But how does this work in the corporate training environment?

First, let's look at your staff of instructors or facilitators. Many times, this staff group is very versatile and flexible by their nature. After all, a totally inflexible instructor may not be very effective in the classroom at all. The members of this group know training materials and they also know how the audiences respond to those materials. Why not consider having the higher-skilled instructors double as instructional designers? For example, a high potential junior facilitator who teaches one or two classes may be able to take responsibility for the updates to those materials and content. Or, a senior instructor, such as a management-training instructor, might have the ability to take charge of the entire management-training program instead of leaving it to various staff members. But you can also look at delivery staff as lateral possibilities. For example, that junior instructor may be bored with one or two subject areas - see how he or she does in a new subject area and make that person available for all of the subjects.

What about instructional designers and developers? Many traditional instructional designers may have started out as SMEs or instructors. It may be possible to utilize them in those capacities, especially if you have high-level designers who are used to facilitating groups as part of their design responsibilities. What if you have instructional developers who came strictly from technical backgrounds and only work in development? Consider mentoring them into content evaluation and even proofreading - this may take some of the workload off of the instructional designers or instructors.

We've already discussed the benefits of asking for contractor funds. If you need to employ contractors in either a design or delivery capacity, it will cost less than hiring them permanently. And this also provides a solid record of what your department can and cannot accomplish with the extra help. When it comes to contractors, keep in mind that the market is potentially saturated with people who can and will do the work, so you will most likely have a great deal of choice in terms of experience and background.

If contracting is not an option, consider "sharing" people in other jobs to help you through the upswing in work. For example, a special project may need an SME's expertise in a certain area. Why not examine the possibility of having the SME design or deliver training during the special project? If the person is regarded as an SME, he or she can probably express ideas well enough to be part of the training detail for the short run. And if you do get the opportunity to add staff in the future, you may be able to hire from within and keep the initial learning curve to a minimum.

Staffing constraints can be very frustrating, which means that we are more likely to throw our hands in the air and just deal with the situation as it exists. But if you think creatively and consider the alternatives to current staffing, you may be able to create a situation that works for both the training department and the overall organization.

Next, we will discuss cultural constraints that arise in corporate training projects.

Training Constraints 4: Cultural Constraints

Summary: Sometimes the constraints you encounter in corporate training are cultural. Let's explore these constraints and determine how to handle them.

Cultural constraints in corporate training are usually linked to something that is going on within the organization. Some of these constraints may be directly related to training, while others may not be related to training at all. In today's environment, corporate cultures are in upheaval, especially in certain industries. There are organizational changes, layoffs, new rules and regulations, and new processes - and some organizations' very survival depends on getting through these issues. Let's look at a few different types of cultural constraints and how to understand them.

To begin with, a major cultural constraint can be training itself. Changes in the way an organization is trained and educated can be an obstacle, especially if new training courses and methods are not within the cultural norm. Perhaps you've introduced a Learning Management System (LMS) or you've moved traditional classroom training into online formats. Or maybe you've begun experimenting with blended learning where none existed before. One of the biggest cultural constraints in corporate training could be an overall organizational learning needs assessment that is making the "knowledge guardians" uncomfortable. Because this constraint is directly related to training, you have the ability to handle it very effectively. First, be sure to communicate consistently with the population. Explain the benefits of the training changes to the audience. Highlight your success stories. If you are dealing with "knowledge guardians" who are resistant to a needs assessment, reassure them that you are using their knowledge for the improvement of the organization as a whole. You can even offer them a spot in the change as a Subject Matter Expert (SME) or facilitator. The idea in training as a constraint is to help the organization's culture move toward the training knowing that it is a big benefit and will help everyone meet their goals.

Overall organizational changes are initially not related to training but sometimes move into the training realm. For example, there may be major policy and procedure changes related to new regulations or rules, or possibly a merger or acquisition. When these changes are first levied on the organization, you may not be involved. But as the changes are implemented, training most likely becomes involved to facilitate knowledge transfer. In this case, be sure that training personnel act as change agents and champion the benefits of the change while they are carrying out the training department's duties.

While we are discussing organizational changes that may lead to a training constraint, it's helpful to remember that the audience may fall into three different groups. The enthusiastic group embraces change and keeps a positive attitude. The second group may be made up of people who are not sure about the change but keep moving forward anyway. The third group is comprised of resistors, that is, people who react badly and negatively to change - and make no secret about it. The key is to figure out how training can help members of these groups move into the group above, i.e. the "not sures" can move into the "enthusiasts" group while the "resistors" can move into the "not sure" group. Looking for this dynamic within any cultural constraint can help the training team navigate the issue and end up with a positive result.

There are changes that may not be related to training at any point. For example, people changes such as layoffs, staff changes, or staff realignments may be related to Human Resources and the individual departments. In many cases of people change, training will not be involved. The key here is to figure out if training can be a partner or support during the change. Perhaps you can highlight the training that realigned staff members may need and assure them that you will be there to provide it. In cases such as this, you may have to wait until the change has passed and go back to regular business.

The key in dealing with cultural constraints in corporate training is to first identify those issues that are related directly or indirectly to training. For those issues, determine how you can work as a strategic partner to work through the constraint. Next, identify those issues that are not related to training. For these issues, determine how training can serve as a support either during or after the change, and wait for the upheaval to settle.

Next, we will examine technical corporate training constraints.

Training Constraints 5: Technical Constraints

Summary: Technical constraints are common in corporate training, and they sometimes occur when all other aspects of a training project fall into place. Let's explore these constraints.

Technical or technology-related training constraints can occur at any point during a training project, whether in the initial stages or after a program has been running for some time. These types of issues can cause obstacles for both online as well as classroom-based training programs. When confronted with a technical constraint, you can look for workarounds or alternatives. Or, sometimes a well-researched cost benefit analysis can inform decision makers and allow them to help you make changes. Let's look at some common technology-related training constraints and how you can handle them.

When it comes to online learning, one common constraint is that your audience does not have access to appropriate hardware for e-learning. This issue usually surfaces at the beginning of an initial rollout project, but it's certainly no reason to stop the project from moving forward. The audience's lack of access could be related to the work environment. For example, assembly-line employees may not have access to computer terminals anywhere in their immediate environment. Or, customer-facing employees may have access to a terminal but cannot use it for training because of the customers' perceptions of inactivity. In these cases, consider installing one or two terminals in various locations for online learning activities. Perhaps the IT department has refurbished hardware that could be redeployed as learning centers at certain locations.

Another common technical constraint is that the audience does not yet have the technical skill for e-learning, especially e-learning that is self-paced. In many industries, this problem is clearing itself up as organizations move to more advanced technology in all of its operations. But there may still be pockets of inexperience out there. In this case, it's a step-by-step education process. Many people are afraid of technology simply because they don't know how to use it. After all, this is an age when centenarians use Twitter and grandparents use videoconferencing and email to chat with their grandchildren. So anyone can learn. One way to deal with an inexperienced audience is to take training "on the road" to show the audience how to use the technology. This arrangement also allows you to position the training department representatives as strategic partners. You can also consider introducing quick reference guides (QRG's) or video tutorials that show the audience how easy it is to access online learning.

Sometimes you'll find that the organizational infrastructure cannot accommodate a full-scale e-learning program. This could be related to bandwidth, i.e. too many people hitting the network at one time could cause serious slowdowns in other areas. And sometimes organizations are hesitant to pay for additional bandwidth space just to accommodate training. In this case, consider rolling e-learning to smaller audiences - one at a time. This way, the entire population will not need to access the online application at the same time, thus saving space and bandwidth.

In relation to classroom technology, what if you wanted to roll out a blended learning program, only to find that there are not enough computers (or funds) to do it? Again, you could find out if IT has refurbished hardware. Or, you can use a "station" mentality within the training program itself. For example, have a portion of the classroom audience hitting the online intervention while another portion works on case studies. Alternatively, if the audience has the ability to access online programs away from the classroom, structure the training to accommodate e-learning at the office, followed by a discussion or debrief in the classroom. If technology is needed in the classroom for a massive training rollout but simply is not available, consider leasing or renting equipment or space until the upgrades can be made. Some conference centers lease not only the space but the technology as well, such as computers, projectors, and LCD displays.

As with all of the other training constraints we've discussed, the key with technical or technology-related constraints is to explore potential workarounds first, and then determine when a permanent change or upgrade can be made. And remember that a technical constraint is no reason to halt a project that could be a major benefit to the organization as a whole.

Next, we will examine content and development constraints.

Training Constraints 6: Content and Development

Summary: Many times the training content itself or the development methods are the source of the constraint. Here are some ways to work around this obstacle.

When you find that issues relating to training content or development are causing a constraint, the best action to take is to look for a suitable alternative or compromise. Content and development usually involves a team of people, including management, instructional designers, stakeholders, and subject matter experts (SMEs), so your skill in leading a team will be helpful in resolving constraints. Let's examine some content and development constraints and determine ways to handle them efficiently.

One of the first and most common content and development constraints occurs when the SME and training do not agree. Most training projects run across a point where the SME and the instructional designers have different ideas of how the content should be developed. Sometimes the SME may be quite possessive of the content and does not want changes. Or the instructional designers feel that content should be edited or truncated in some way that does not go along with the SME's original meaning or intent. If this issue is related to e-learning, there may be too much content for the medium. If any of these problems exist, talk to the SME to see if there is a compromise. Explain the benefits of the changes and paint a picture of what the end result may look like. If there is no compromise, sometimes the best path to take is to continue with the SME's original idea. More often than not, he or she may see the obstacle when the training is developed.

Another content constraint may arise when you discover that the content does not match what's actually going on in the environment. For example, you find out that customer service associates are skipping CRM steps in their day-to-day interactions, although those steps are part of a policy or procedure. If an SME is involved, talk to him or her first. If there is no SME, determine what the major differences are and present them to the training stakeholders. But keep in mind that you may have uncovered a disconnect between Policy and Procedure and the departments or even between managers and associates. The best you can do is highlight the issue, make suggestions for change, and wait until a decision is reached to continue the development of the topic in question.

Content constraints can also appear in conflict between the instructional designer and the person managing the design or the project itself. A designer may have a different idea of how the training should be developed. The key here is to remember that a different idea is not necessarily a bad one, even if it is contrary to original specifications. The first action to take is to go back to the SME or stakeholder to look at the source first. Discuss the differences with the instructional designer and point him or her into the direction that will result in the closest outcome, whether that is the original or a modification.

At times, content scope may grow, especially if an SME sees the product for the first time and is reminded of missing pieces or choppy content. In this case, you must be highly aware of the timeline, delivery method, and assigned staffing. If it's possible to add or change content, go ahead and do it. If not, discuss a potential timeline change with the stakeholders or SME, keeping in mind that your overall goal is to get the training as close to "correct" in the first design. If there is simply no compromise, deliver what was originally intended and slate it for redesign immediately.

The key to handling content and development constraints is to be consistent in communication and definition of training with SME's, stakeholders, and designers at all times. Always look for compromise or alternatives, and lead the team into being open to changes along the way. Remember that a change is not necessarily a bad thing, especially after a designer or SME is deeply involved in the content. When there is no compromise or workaround, move forward with what you have. When it's time to evaluate it, your learners will most likely be able to give you suggestions for improvement or change that will work well.

Our final corporate training constraint will be industry, regulatory, and delivery constraints.

Training Constraints 7: Industry, Regulatory, and Delivery Constraints

Summary: What happens when the environment for training becomes a constraint? Let's define this obstacle and discuss ways to work within it.

An organization's general environment can become a training constraint, sometimes occurring quickly and noticeably and sometimes occurring slowly. The constraint related to environment could be due to inexperienced facilitators or training locations, or could be something altogether larger such as regulatory or industry changes. Let's discuss these corporate training constraints and how to manage them.

Industry constraints can occur when an overall industry begins to change rapidly. In today's environment, we see that many industries are being overhauled and must change the way business is conducted in order to survive. But how does this affect training and development? Remember that training managers should always have an idea of what's going on in the industry around them, so that changes do not surprise the training team. So when you notice that a change is taking place, you may not want to develop training in certain subject areas because they will be affected by the change. In this case, consider creating a "skeleton" or using the least expensive training method available until the change comes through. Keep in mind that "expense" can be related to money, time, or resources. You can also benchmark other organizations within the industry to see how they are dealing with the coming changes. If there is an advisory or regulatory body, consider contacting these groups to obtain advice or feedback on how training can approach the changes.

Regulatory constraints occur hand in hand with industry changes. Highly regulated industries see changes all the time, but with the general upheaval that has occurred in the past few years these changes may occur on a daily basis. Obviously this is a constraint for the training organization. Regulations now not only stipulate content, but also may stipulate the length of training and prohibit certain types of training. These same regulations may require organizations to submit training plans and report completions within a certain timeline. If you are dealing with a constraint like this one and you don't have the manpower to handle it, consider outsourcing. Many training outsourcers provide organizations with one stop shopping in regard to certain regulations, including content, tracking, and reporting. This may be the way to go until things settle down or until you have a good idea of how training departments should handle the requirements. Typically there is no workaround or alternative for regulatory training, but you may be able to work within the framework to determine a training method that works best for your organization.

We have already discussed some delivery constraints in this series, but let's look at them a little more closely. A common delivery constraint is due to lack of experienced facilitators. For example, a regulatory change may literally change the playing field for all training personnel. One way to deal with this is to determine which training personnel are the closest to being able to deliver in terms of knowledge and experience and then determine what it will take to get them up to speed. If the timeline for readiness is too long, it may be appropriate to consider outsourcing. If you outsource, you can work out a deal where your instructors are able to work with the outsourcer's instructors in order to best prepare them for the next round of delivery.

What if there is a constraint related to the delivery methods themselves? For example, an SME may be on board with delivery methods until he or she actually sees the final product. He or she may decide that the choice of delivery method doesn't achieve the desired outcome. If this is the case, look for compromise with the

SME, stakeholders, and instructional designers first. The compromise may be a change in length, a quick conversion of training methods, or a "back to the drawing board" order. The idea here, as is usual whenever you are dealing with SMEs, is to position yourself as a partner and not as an obstacle. On the other hand, if the delivery method seems to work but there is still disagreement from the SME, ask for time to evaluate the program first. A green light from learners and their supervisors is fact-based and may help the SME to understand that training has met its mark.

Bryant Nielson – Managing 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.

Financial Training Solutions (FTS), the instructor-led division of CapitalWave Inc. is a firm made of up industry professionals having a reputation for providing first-rate training and consultancy to banks and other financial institutions. FTS offers professionals who have extensive knowledge, experience and expertise in the areas of banking and finance.

Blended learning is the philosophy on which the company was founded. Our training methodology, integrating theory with practice using our own very powerful training tools, creates a uniquely exciting and effective learning environment. The result pays immediate dividends in the retention of newly-learned concepts and their practical application in the financial marketplace.

CapitalWave Inc.

Delivering Innovative Training Solutions

For further information, please contact:

Financial Training Solutions is a division of CapitalWave Inc.

Bryant Nielson, Managing Director

http://www.CapitalWave.com

http://www.FinancialTrainingSolutions.com
http://www.YourTrainingEdge.com

Tele US: +1 (917) 477-3221
Tele UK: + 44 (20) 3356 9935
bryant.nielson@financialtrainingsolutions.com