Understanding Your Training Process

In a previous article and presentation, Transforming Your Training Department Into A High Performance Strategic Partner (available at www.trainingonashoestring.com), I spoke about the steps associated with creating a high performance training organization. One of the steps reviewed creating a mission statement. Related to this is understanding the training process. Training, like any other function, is a process complete with suppliers, inputs, your training process, outputs and customers (SIPOC).

Consistent with any improvement methodology is the premise that if you don't understand your process, how can you improve it? So how do you define training as a process? Figure 1 is an example of a high level process flow diagram outlining the key steps in the training process. I will review the basics of this process as it relates to the SIPOC concept and then outline ways that this has helped in the development of our training procedure and defining the metrics used to measure the effectiveness of our training initiatives.

The key is to start at the beginning, which is to first understand your process at a higher level and then to begin drilling down into each aspect of your process identifying those areas that are ripe for the next step, process improvement. There are a number of tools that you can use to create your process map. The simplest is using a flow chart to identify the basic steps and decision points in your process. Figure 1 was created using Excel along with the drawing tools that are available. Using the Autoshapes option you can even select Flow Chart symbols. There are more sophisticated flow charting tools such as Visio and even exercises such as Value Stream Mapping that can provide much more detail.

The best place to begin is with your mission statement. This needs to be a statement reflecting what it is you are providing, to whom along with the perceived value add from your customer's perspective. A format to draft a mission statement is included in the Transforming article previously mentioned.

Below is an example of a mission statement that we have formulated for our department. From this we can now begin to identify our process. I have found that it is best to begin with laying out your process and then identifying your outputs and customers, followed by your suppliers and inputs.

MED will drive transformation by increasing the technical knowledge and skill sets primarily focusing on Team Operators, Team Associates, Team Machine Operators, Manufacturing, Engineering and Test Technicians, Team Leaders and Supervisors.

We accomplish this through the design, development and delivery of just-intime oriented training, floor support, job aids, training matrices, training reports, tracking training activities and comprehensive certifications for all key positions.

MED staff will partner will all levels in Operations to identify gaps, propose solutions, devise methods to ensure that training knowledge is retained and provide consultation on ways to improve the overall effectiveness of Operations through training.

Process (P)

The majority of Figure 1 focuses on our training process. Lets take a closer look at some of the key elements.

1. Needs Assessment

As stated in the diagram,

"An assessment is made to determine the true training needs vs. performance issues, etc. The key is identifying what knowledge and skills need to be learned. This is often based on a problem or issue that is driven by one of the sources above. Inhibitors towards successful implementation of the training need to be reviewed as well. The process of assessing training needs requires an understanding of all the various factors, social, cultural, economic which can enhance or restrict the access to or benefit from training. It is a process of negotiation between the training manager and their 'client' at the end of which all parties should be agreed about the scope, purpose and expected outcome of the training."

Note that the flow chart does not provide the detail of how the needs assessment is conducted and analyzed. This detail should be written in a separate "work instruction" document. What I have found to be effective is to capture this detail in the same manner as the training process, in flow chart format. We color code the various steps to identify which role is responsible for conducting each step. An

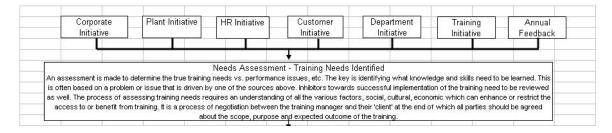
example will be shared later in this paper.

2. The Training Process

From here our work begins. As you can see from our diagram, we state that the next step is to determine the best training methodology. Notes are provided to add more meaning to these steps so that anyone viewing our process can understand what is basically involved in various steps.

The rest of the steps should be self-explanatory to those in the training profession. Since we are a manufacturing center, the concept of certifications is critical. As a key element we have included this step in our high level overview of our process. Once again, the detail for how each of these are conducted, are captured in work instruction flow charts (see Figure 2).

3. Suppliers & Inputs (SI)



Every process has suppliers that provide inputs that allow you to perform in this case the process of training. In our case we have identified our customers as our suppliers as well. They provide us with their problems formally through a needs assessment and informally on a day-to-day basis.

Understanding this has helped us to develop steps in our process to ensure that we obtain this information, clarify the needs and then track this in our Project Log. We use the procedure to explain to these suppliers what we need to know when they present us with an issue. This ensures that we get what we need to turn around and provide them the most value add product or service. This helps to establish an internal supplier-customer chain. True of many service functions, our customers are also our suppliers.

In other cases, vendors may also serve as suppliers (e.g. applications – LMS, Content Development; outsourced development companies, etc.). We chose not to capture this in our higher level flow chart, although an argument can be made to include them. You may want to have a more detailed flow chart for your own department. This is where conducting a value stream mapping exercise can provide you with all of this detail. I have found that having a simpler overview works well to describe our training process to our internal and external customers, auditors, etc.

4. Outputs and Customers (OC)

Our customers and outputs we provide to them are best explained in our mission statement. We felt that the combination of these two documents (mission statement and process flow) were sufficient to explain to anyone what we do and who we do it for. As a result we did not duplicate this information in the process flow chart. However, we did show how we evaluate the effectiveness of our training initiatives (Level 1-4 evaluations).

Summary

Developing our mission statement and process flow diagram were beneficial in a number of ways including:

1. Creating a training procedure

Essential to any operation is creating and communicating proper SOP's. This helps to ensure consistency and is often used as a reference when questions arise regarding why we are doing what we are doing. It is also essential to training your own training department staff so that everyone operates to these procedures and in a consistent format.

2. External Customer and Auditor requirements

As a company we are required to maintain certifications for TS 16949, ISO 14001, etc. One of the key elements for each of these certifications is having a training procedure and then being able to demonstrate compliance with these procedures. Having a well defined process, training procedure and work instructions help to demonstrate that we have our house in order.

The relatively new TS 16949 requirements go beyond the former compliance based systems and focuses more so on ensuring that each department define and understand their process and metrics, along with how their process and metrics ties in to the ultimate customer metrics.

In addition, our external customers also conduct site visits and audits. The vast majority of these visits include reviewing the training function. Once again, having these documents in hand help to establish respect and credibility early on. Naturally, you must be able to back up what you are saying you are doing.

3. Developing and continuously improving your training process.

Ultimately, these steps help to create the structure and organization of the training department. The combination of our strategic plan, mission statement, training process flow, training procedure, metrics and work instructions all serve as the

basis for defining what we do and how we do it. Another major benefit relates to the concept of continuous improvement. As the saying goes, one cannot improve their process unless they know their process, continuous improvement is most effective when you first understand what you are doing and then identify those areas needing improvement.

On a final note, one word of caution. There is a strong temptation to create these documents solely to satisfy external auditor or customer requirements. It has been my experience that this will eventually catch up with you as more advanced audit practices check to ensure that you have an adequate process and are doing what you say you are doing. More important than this in my view is the fact that these tools really do help training management to create a high impact and value add organization.

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4. Figure 1.

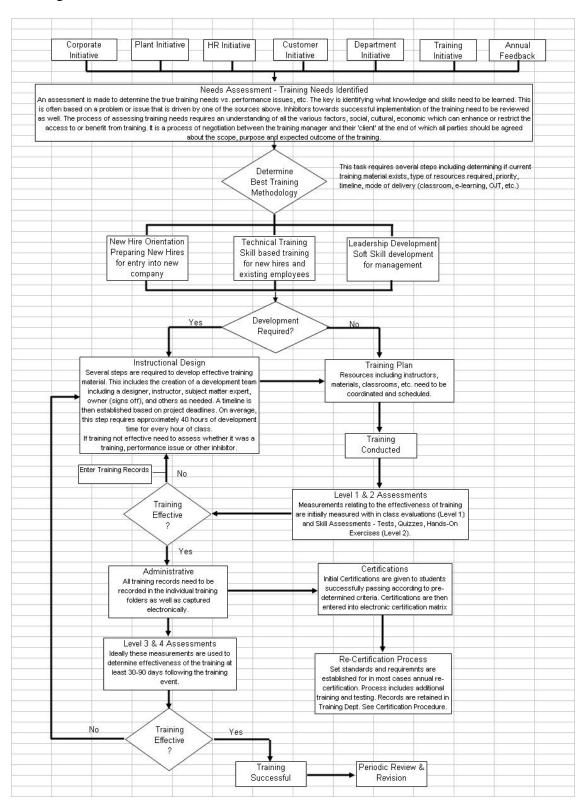


Figure 2.

