

Training

A Strategic View

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Approach and Worldview

Our approach to our world is shaped by our view of it. To some extent, to grow or to change or to learn involved modifying our worldview. The same is true of our practice as instructional or performance technologists or just plain trainers, that is, our practice is shaped by our view of the technology on which we rely. To grow in our practice, then, requires us to examine and to change our view of it.

I believe the prevailing view of training is tactical (i.e., short-range and narrow in scope). There is emerging from my own practice a view of training that might be termed strategic (i.e., long-range and broad in scope). This strategic view of training is the subject of this article. Let's begin with the origins of this strategic view, some of the projects that gave rise to it.

Project 1: Job Clarity

Company A, a major telecommunications company, contracted for an evaluation of one of its management training courses. The course in question equipped managers to develop a particular kind of written job description. It also required them to develop job descriptions for their subordinates. As part of a post-course assignment, these managers met with their bosses and subordinates to review, clarify, and develop a mutual understanding of the jobs involved.

At a tactical level, the course is exactly what it appears to be – a training course that prepares people to prepare job descriptions and engage in discussions pertaining to these descriptions. At a strategic level, however, it is something else. It is an intervention, and a very effective one.

As an intervention, the course focuses organizational energy on an organizational issue, which is to say it focuses the time, attention, and effort of the trainees on job clarity. It is approximately two days of highly structured and concentrated time spent thinking about the jobs in question, followed by some discussions of the fruits of that thinking. The course structures not only the content but also the process of thinking about the job.

Concentrating and channeling organizational energy along productive lines is the essence of management. Concentrating and channeling energy is the essence of training as well. In this regard, training is clearly a strategic management tool.

To focus energy, one must have something on which to focus; a target is required. The issue must be brought front and center. "Channeling energy along productive lines" implies a reference condition, some standard for assessing what is being done and how well. In other words, there needs to be a model, often literally a "picture" of the job. This need for a standard, a model, a reference condition, brings us to the next project.

Project 2: Work Mapping

Company B, the travelers check subsidiary of a major financial services firm, contracted to have training developed for a group of travelers check claims examiners, people who process claims related to lost or stolen travelers checks. Twelve major task areas had been identified as part of a preliminary analytical effort. One of these was selected as a prototype (i.e., it would be taken all the way from analysis through field testing before committing heavily to the development of training for the other eleven task areas).

The initial objective was to map or diagram the work associated with the first task area. The most visible aspects of this work were the entries made by the examiners on various forms. These entries reflected the outcomes of their decisions. Using these entries as starting points, the decisions behind the entries were identified and analyzed. This was accomplished through interviews with supervisory level managers. The supervisors and managers were subject-matter experts (SMEs) and they were also master performers. More important, they had the authority to specify how the decisions should be made.

Subsequently, standards and guidelines for the full range of claims adjudication decisions were prepared and distributed in the form of algorithmic flowcharts, decision tables, and other job aids. Several policy decisions were called for the course of preparing these job aids. The examiners were then trained in the use of these job aids, in some cases, by the same managers who had served as SMEs. In short, they were trained by their bosses.

In this case, the strategic use of training was to make visible and redefine the work itself. Making the work visible and having the managers conduct the training brought to light the need for policy decisions, procedural standards, and some means of measuring job performance. It also revealed inconsistencies and irregularities in the structure of the work itself, leading to a follow-on effort to examine the structure of the work itself and the organization doing it. A new chairman was quick to spot the benefits of “mapping” the work and instituted similar mapping efforts in other operations.

Project 3: De-Bugging the System

Company C, a major health insurer, with the help of one of the country’s largest consulting firms, was installing a massive, new, automated medical claims processing system. Training was needed for the examiners who would manually process claims suspended or “kicked out” from automated processing. The consulting firm did not have a practice area in training; the client firm’s training area was overworked, and so a small consulting firm was brought in to handle the training aspects associated with introducing the new system.

For the portion of the new system involving manual claims adjudication, the problem was much the same as described in the preceding example, namely, one of defining or mapping the work. Again, algorithms and decision tables were used. Again, policy and procedural “glitches” were identified. But this time, instead of leading back to the work itself, they led back to the automated system. Patterns in the claims being suspended by the new system suggested processing problems in the automated system. Enough of these were surfaced by the training development group that it pursued and was instrumental in setting up and working with a prototype claims processing operation for the explicit purpose of detecting “glitches” in the automated system, analyzing these “glitches,” and feeding back the results of these analyses to the systems development group. As a consequence, “training” made a highly visible and valuable contribution to the overall success of the new system.

In this case, the strategic use of training was in support of a new system introduction, in particular, in testing the system itself.

Speculation

Three strategic uses of training have been discussed to this point: (1) focusing energy on issues, (2) making work and work-related issues visible and drawing management attention to them, and (3) supporting other interventions. With a little imagination, one can conjure up other strategic applications of training. For example, suppose an organization is caught up in the throes of tumul-

tuous change. In times like these, the routine content of many managers' jobs goes way down and the novel or problem-solving component goes way up. What better time for a concerted, organization-wide problem-solving effort? Sessions could focus on "live" issues, making payoffs immediate and visible. Group sessions could be structured for more complex issues. A common problem-solving language could be established and the language itself could be captured. ("Capture the language," by the way, and you have corralled one of the major change tools available to management: the means of articulating the future.) In short, one can use training to focus organizational energy on important issues in a structured, systematic manner, and it looks like training (which isn't bad positioning because, if training is anything, it is "safe," that is, training rarely scares people the same way an "intervention" can).

Reasons for Adopting A Strategic View of Training

One reason is the breakneck rate of change in the world about us. One does not have to be a devotee of Tofler (1971, 1980) to know that the world is in a state of turmoil. The world of work and working is not immune. Organizations are among the most prominent victims of change and, at the same time, one of its chief proponents. Managers require sound ways of concentrating and channeling organizational energy – and fast! In many cases, an approach based on a lengthy front-end analysis is unacceptable. Study time is at a minimum. To paraphrase a writer whose name escapes me: Trainers must think broadly if they are to think at all.

Another reason is the advent of what Peter Drucker (1968) calls "the knowledge worker." Work is largely mind-based now, not muscle-based. (If you don't like the mind-muscle dichotomy, try brain-brawn instead.) When work was predominantly muscle-based, control was comparatively easy: watch what people were doing and if they were not doing it properly, management could counsel, correct, or "can" them. As John Kenneth Galbraith (1977) put it, "The laggard worker could be easily identified." Muscles were plentiful and thus cheap. Moreover, one set was easily substituted for another. People were (and often still are) seen as instruments of a central organizational will, not as agents having a will and purposes of their own (see William Powers' 1973 book, *Behavior: The Control of Perception*, for a thorough treatment of the individual as an autonomous agent). In the world of muscle-work, training quite rightly focused on observable behaviors.

The work of most knowledge workers, however, is hidden from view, buried in the recesses of the worker's mind, governed by feedback against a set of internally held reference conditions. That work, and those reference conditions need to be made visible and, in many cases, clarified and negotiated. Until they are, knowledge work can be neither measured nor controlled, except in a very general sense. One of the major challenges facing management in the 80s is that of finding ways to make knowledge work visible, measurable, and subject to external influence. Training can make a contribution in this vein because the establishment of internal reference conditions is an act of commitment and communication and, in one sense, that is what training is all about.

The last reason to be given here for adopting a strategic view of training is that a purely tactical view is unnecessarily limiting and, in some instances, counterproductive. Pushed to extremes, the tactical view of training is that it is a sometimes useful solution to a certain kind of performance problem (existent or anticipated). This confines training to the role of an occasionally useful remedy for skill or knowledge deficiencies. Training has that as one of its uses, but it is only one of many, and it is a tactical, not a strategic use.

A Couple of Cautions

It is well to keep in mind that training is used to certify, to indoctrinate, to license, to orient, and to communicate and disseminate information and knowledge. In short, training is an important management tool, not the private domain of those who specialize in its development and delivery, nor of those who would restrict its use as noted in the preceding paragraph.

At the tactical level, there is a great deal of attention paid to how training gets developed, perhaps too much. This attention seems rooted in the distinction made years ago between the process and the content of instruction. This distinction enables people who are neither subject matter experts nor master performers to develop training. This approach also leads to an extremely detailed set of specifications for the process and precious few for the product. As a result, we have a plethora of standards defining a good or sound training development process but precious few defining good training. By default, good training becomes that which was developed in a certain way. Adherence to good practice usurps effectiveness. Thus it is that means are substituted for ends.

Summary and Conclusions

In this paper, I attempted to make a brief case for adopting a strategic view of training as well as a tactical one. I believe a strategic view of training augments and compliments the prevailing tactical view, broadening the appeal and increasing the value of training and trainers.

The major differences I see between the strategic and the tactical views of training are scope and time frame. The strategic view is broad and long-term; the tactical view is narrow and short-term. Until training (and trainers) can demonstrate strategic value, it (and they) will be confined to a tactical role.

By way of three cases drawn from my own practice, I illustrated what I believe to be three strategic uses of training: (1) to concentrate and channel organizational energy along productive lines, (2) to make work and work-related issues visible and amenable to improvement, and (3) to support other kinds of interventions. Other strategic uses of training were suggested, even if only speculatively.

In closing, let us ask, “Who has need for a strategic view of training?” Managers and trainers mostly. Trainers so as to make a meaningful contribution to their organization’s objectives, managers in order to make better use of one of their best tools for change and improvement: Training.

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