



**TRAINING THAT DRIVES  
ORGANIZATIONAL RESULTS**

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The Why, What, and How

**Greg Goates**  
Goates Consulting Group

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*"Creating Competitive Companies – One Leader at a Time"*

Executive Coaching • Leadership Development • Organization Effectiveness • Facilitation • Strategic Human Resource Leadership

**Our Agenda Today:**

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- ☀ **The Why:**  
Training and Development's importance today
- ☀ **The What:**  
Seven Stage Organizational Training Model
- ☀ **The How:**  
Tools and Tips
- ☀ **Question and Answers**

**The Why:  
Talent Management and Retention Stays in the  
Spotlight**

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- ☀ There are not enough skilled workers to go around.
- ☀ Workers' attitudes and expectations have shifted – permanently!
- ☀ New employment options continuously lure the best and the brightest.

**The Why:  
Talent Management & Retention Stays in the  
Spotlight**

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- ☀ Finding a new job has seldom been easier.
- ☀ The cost of losing talent is high, no matter what the economic conditions.
- ☀ During and immediately following downsizing, the risks of losing or disengaging top talent is especially high.
- ☀ In the new economy, talent is a key differentiator.

## The Why:

Our Goal is to:

- ☀ **Engage**
- ☀ **Develop**
- ☀ **Retain Talent**

### THE BOTTOM LINE

*"Talent is now a critical driver of corporate performance and a company's ability to attract, develop and retain talent will be a major competitive advantage far into the future."*

*War for Talent, Ed Michaels et al.*

## The Why: What Kept You?

- |                                                                    |                                                                 |
|--------------------------------------------------------------------|-----------------------------------------------------------------|
| <input type="checkbox"/> Exciting work, challenge                  | <input type="checkbox"/> Autonomy, creativity, sense of control |
| <input type="checkbox"/> Career growth, learning and development   | <input type="checkbox"/> Flexibility: work hours, dress, etc.   |
| <input type="checkbox"/> Fair pay & benefits                       | <input type="checkbox"/> Security                               |
| <input type="checkbox"/> Working with great people & relationships | <input type="checkbox"/> Location                               |
| <input type="checkbox"/> Good boss                                 | <input type="checkbox"/> Diverse, changing work                 |
| <input type="checkbox"/> Pride in organization, mission, product   | <input type="checkbox"/> Fun                                    |
| <input type="checkbox"/> Great work environment, culture           | <input type="checkbox"/> Responsibility                         |
| <input type="checkbox"/> Recognition, valued, respected            | <input type="checkbox"/> Being part of a team                   |
| <input type="checkbox"/> Meaningful work – making a contribution   | <input type="checkbox"/> Work/life balance                      |
|                                                                    | <input type="checkbox"/> Loyalty and commitment                 |
|                                                                    | <input type="checkbox"/> Comfort on the job                     |

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## The Why: What Keeps 'Em?

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And the survey says . . . .?

- ☀ **Exciting Work and Challenge – 48.0%**
- ☀ **Career Growth, Learning & Development – 42.9%**
- ☀ **Working w/ Great People & Relationships – 42.0%**

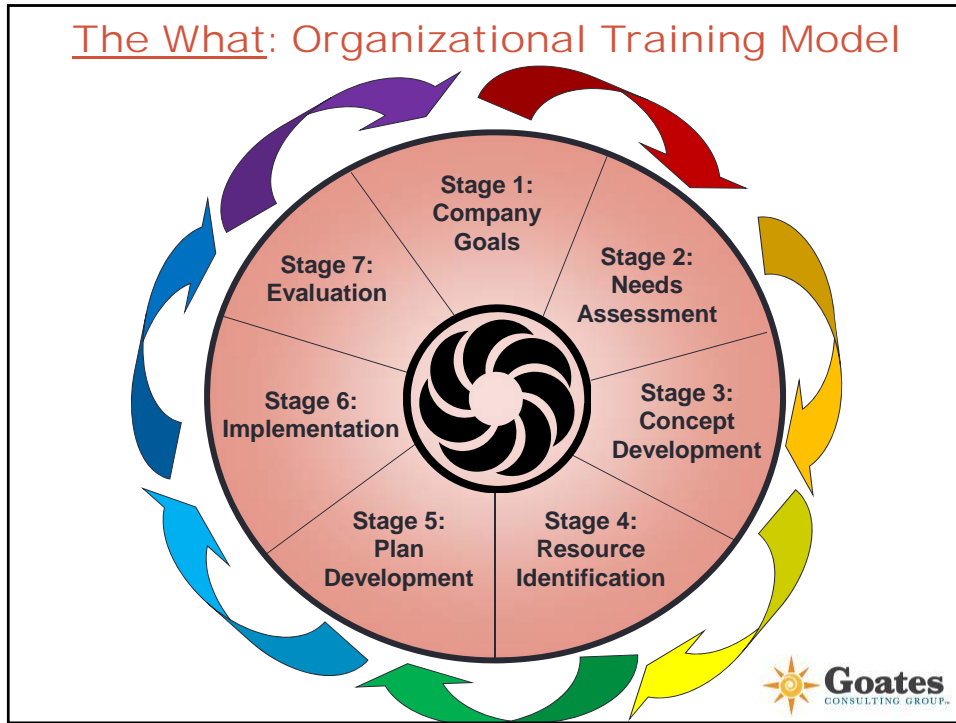
*Statistical Summaries of Retention Data –  
The Retention and Engagement Drivers Report  
Beverly Kaye & Sharon Jordan Evans*

## The What

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- ☀ Organizational Training: Never Ending Organization Retention & Continuous Improvement Strategy
- ☀ Seven Stage Model
- ☀ Based on ASTD Best Practices

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The How:  
**Stage One – Company Goals**

- ✦ Start with your Strategic Plan
- ✦ Understand the Vision for the future of your company – “Know where you’re going”
- ✦ Identify key “People” implications and initiatives
- ✦ Create Workforce Development Plan

*Begin with the End in Mind*

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The How:  
**Stage One – Company Goals**

**Workforce Development Plan (WDP)**

Company Goals	Strategies	Competencies/ Curriculum	Score Card
<b>Leadership &amp; Culture</b> <ul style="list-style-type: none"> <li>Build a Change-Ready Organization</li> <li>Improve Employee Satisfaction</li> <li>Improve Customer Satisfaction</li> <li>Insure Leadership Continuity</li> </ul>	Improve skills of workforce with fresh talent in the organization Establish formal career development process to retain the best employees Attract new talent from local universities (i.e. intern program) Encourage outside education (i.e. degrees, certifications) with company reimbursement	Sr. Leadership Training Leadership Training (Mgrs) New Supervisor Training Team Building Ethics Training	Customer survey Trn course conducted Trn effectiveness Mentor process imp. # Internal promotions
<b>Operational Excellence</b> <ul style="list-style-type: none"> <li>Achieve revenue, profit and growth goals</li> <li>Increase RONA</li> <li>Improve New Product Development Cycle Time and Operating efficiencies</li> </ul>			
<b>Improve Workforce Development</b> <ul style="list-style-type: none"> <li>Establish and Deploy a Workforce Development Process (OT)</li> <li>Promote Leadership from Within</li> <li>Attract New Talent from Local Universities</li> </ul>			

*Clarify the "Desired State" of Your Organization*

The How:  
**Stage Two – Needs Assessment**

- ☀ Start with Performance Reviews and aggregate data on development needs
- ☀ Use data from Employee Surveys
- ☀ Interview Leaders and Key Stake holders
- ☀ Do an actual Training Needs Survey with Employees & Managers
- ☀ GET DATA!

*Identify "Current State" of the Organization*

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**The How:**  
**Stage Three – Concept Plan**

- ✦ Design a conceptual Training Plan from the Competencies/Curriculum WDP
- ✦ Courses down left column
- ✦ Training Groups across top

*Design a bridge that Spans the Gap between  
"Current State" NOW and "Desired State" VISION*

**The How:**  
**Stage Three – Concept Plan**  
**Training Plan**

Curriculum Elements	Class Hrs	Grp 1	Grp 2	Grp 3	Grp 4	Grp 5	Grp 6	Grp 7	Est. # Trainees
		Non-tech Mgmt	Tech Mgmt	Project Mgmt	Lead Design	Qual Assur (exem)	Quality Assur (hrly)	Config Mgmt	
Program Management	54			10	10				20
Leadership (Sup, Man, tech leads)	24	20	20						40
Risk Management	8		20		10				40
Ethics - Compliance	1	20	20	10	10	30	70	40	200
Finance for Non Financial Managers	4		20	10	10	30			200
Negotiations	16	20							40
New Supervisor	8			10		30			10
Team Building	4	20	20	10	10	30	70	40	200

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**The How:**  
**Stage Three – Concept Plan**

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**Form an Educational Steering Committee**

**Purpose of the Educational Steering Committee (ESC)**

Company-wide strategic training needs a high-level decision-making body for input into the selection of goals and allocation of resources.

**ESC Charter:**

- ✦ Commit to the development of a competitive workforce
- ✦ Adopt a systematic approach to training and education in support of company goals and targeted to learners' needs
- ✦ Ensure organizational support for training

*ESC Builds Support for Organizational Training & Development*

**The How:**  
**Stage Four – Resources**

- ✦ Revise Organizational Training Plan with feedback from ESC
- ✦ Appoint an internal Course Sponsor (SME) for each module
- ✦ Determine internal and external resources required to do training
- ✦ Identify Trainers for each course

*Identify Resources Required for Organizational Training Plan*

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## The How: Stage Four – Resources

Curriculum Elements	Class Hrs	# Trainees	Class Size	Course Sponsor	Internal or External	Trainer	Total Class Hours
Program Management	54	20	20		Ext		1080
Leadership	24	40	20		Ext		960
Risk Management	8	40	20		Ext		160
Ethics - Compliance	1	200	20		Int		200
Finance for Non Financial Managers	4	200	20		Int		800
Negotiations	16	40	20		Ext		720
New Supervisor	8	40	20		Int		320
Team Building	4	200	20		Ext		800

## The How: Stage Five – Plan Development

- ☀ Meet with CEO & CFO regarding Training budget requirements
- ☀ Develop 12 – 18 month Roll Out Plan – ID Training Blackout periods
- ☀ Finalize Organizational Training Plan with ESC
- ☀ Develop Employee Communications - WIIFM
- ☀ Design Evaluation Plan for EACH Training module

**\$, Training Schedule and Communications Planning**

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**The How:**  
**Stage Six – Implementation**

- ☀ Use good project management techniques
- ☀ Implement Employee Communications – “Start Broadcasting WIIFM”
- ☀ Adjust Schedule as Required – watch for “slippage”
- ☀ ESC Critical to Insure Organizational Support for Training
- ☀ Capture Training Evaluation Data – create Continuous Improvement Loop

*Where the Rubber Meets the Road: Quality, Schedule, Cost*

**The How:**  
**Stage Seven – Evaluation**

Don Kirkpatrick’s

Four Levels of Training Evaluation:

- 1: **Reaction** – “Smile Sheets”
- 2: **Knowledge** – “Pre and/or Post Tests”
- 3: **Behavior** – “Check lists, 360 multi-rater”
- 4: **Organizational Results** – “Demonstrated ROI”

*What Gets Measured, Gets Done and Repeated*

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**The How:**  
**Stage Seven – Evaluation**

- ✦ Evaluation Plan created and implemented for EACH module of training
- ✦ ESC meets quarterly, reviews Training Course Evaluation trend data
- ✦ Make course corrections as required to achieve desired organizational results
- ✦ Revisit WDP Scorecard Measures

*Capture the Data that Measures Organizational Results*

**The How:**  
**Stage Seven – Resources**

**Training Plan – Evaluation**

Curriculum Elements	Class Hrs	# Trainees	Class Size	Level 1	Level 2	Level 3	Level 4
Program Management	54	20	20	X	X		X
Leadership	24	40	20	X		X	
Risk Management	8	40	20	X	X		X
Ethics - Compliance	1	200	20	X	X		X
Finance for Non Financial Managers	4	200	20	X	X		
Negotiations	16	40	20	X	X		X
New Supervisor	8	40	20	X		X	
Team Building	4	200	20	X		X	

*Lower levels Easier – Higher levels Harder to Implement*

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## In Review:

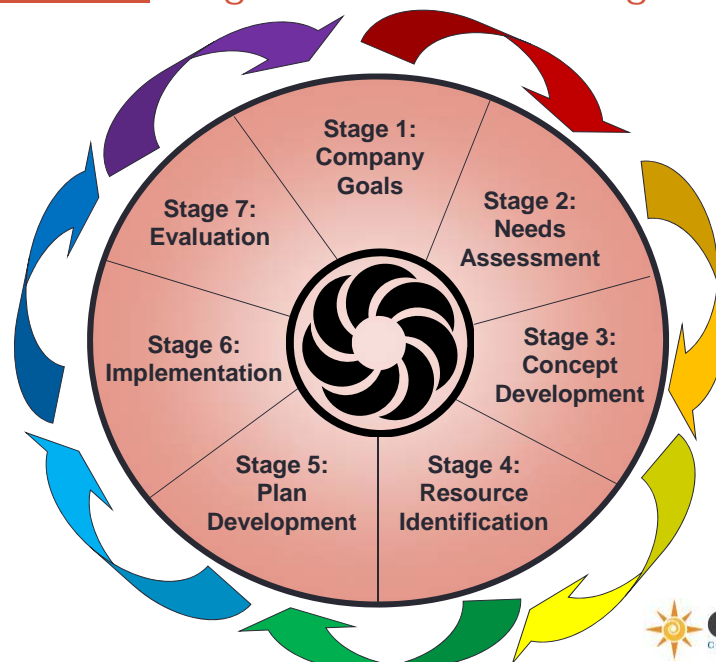
### The Why:

- ✦ Systematic Organizational Training is a **MAJOR** part of your company's Employee Retention Strategy in the Upcoming War for Talent !

### The What:

- ✦ Seven Stage Best Practice Organizational Training Model

## The What: Organizational Training Model



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## In Review:


### The How:

Tools & Tips

- ✦ **Workforce Development Plan** – tie ALL training to organizational strategy
- ✦ **Education Steering Committee** – involve in design & deployment phases
- ✦ **Course Content Sponsors** – tailor the learning to your organization
- ✦ **Evaluation** – Design and Build, to capture data to measure effectiveness of training
- ✦ **Report Results** – to Senior Team/ESC

## In Review:

- ✦ **Questions and Answers**
- ✦ **Thanks for Listening!**



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