

## 1 Introduction

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This book is written for people working in organizations who need to make investment decisions about the merits and demerits of activities which are variously labelled as 'training', 'development', 'change programmes', 'attitude change', 'communications exercise', and the like. All these activities have in common a stated intention (sometimes cynically stated) to cause changes which benefit the employing organization and, sometimes, the individual employee.

As well as conventional 'courses', we are concerned with such learning activities as follow:

- Kerbside conferences and other coaching opportunities.
- Training elements within regular staff meetings.
- Distance learning.
- Corporate communications events.
- Problem-solving teams.
- Computer-based training (CBT).
- Interactive video.
- Action learning.

Indeed, virtually any activity intended to improve people's capability to perform a work task is included. All these activities will be grouped under the heading 'training'.

'Learning for learning's sake' may have its justifications but, outside of academia, where a rationale for 'pure learning' can be sustained, those justifications do not extend to helping either commercial or public sector organizations to operate more effectively or efficiently. It is an axiom of this book that strategy and evaluation are concepts that make sense only within a context of purposeful activity. Purposeful activity is not, of course, the exclusive preserve of commerce and industry.

The purposes of this book can be clearly stated:

1. To describe the links between training strategy and training evaluation.
2. To enable readers to develop a soundly-based strategy for training in their organizations.
3. To enable readers to develop a strategy for systematic evaluation of training activities.

4. To provide detailed guidance on the design of evaluation instruments.
5. To inform readers through illustrative case studies of evaluation in practice.

In keeping with the practical orientation of this book, you are invited to develop a personal action plan to make use of the ideas it describes. Personal action-planning instruments are included at appropriate points in the text. In addition, you are invited to photocopy the page headed 'Ideas Diary' and to use this both as a bookmark and as a running list of key points that you would like to try out in the future. In this way, your Ideas Diary sheets will build up into a detailed plan for implementing strategic and evaluation concepts.

This book is intended to improve the quality of training that is provided within organizations. It is therefore a useful preliminary question to ask whether training *matters*, in general and to each reader. In the past there has been a tendency to 'put up with things' (specifically, low standards) in training which suggests that little was expected and therefore training was not perceived to matter. Periodic outbreaks of training 'fads' reinforce the idea that it is not serious, that – at best – 'training will do no harm'. However, there are two, more systematic ways to form a judgement about whether or not training matters.

The first is to make an accurate calculation of what training currently costs the organization: how much is training depleting the gross profit (GP) line – and what estimate can you make of how much it is adding back? Would GP be higher or lower if all training ceased?

Training incurs direct costs: the money, time and expertise required to design and run training events; the pay and overheads of course members. In addition, there are the indirect costs of training premises and administration. Training also incurs opportunity costs. There are opportunity costs for the organization as a whole – money spent on training might be spent instead on new equipment; operatives could be producing goods rather than sitting in a training room. And there are opportunity costs within the training budget itself – the money spent on, say, a senior manager attending a prestigious business school course might leave no money for on-job training of clerical grades. Using Figure 1.1 you will be able to calculate costs presently being incurred.

The second method of calculation is to identify all those areas where performance deficiencies are costing money, and where suitable training might be expected to improve performance levels. Figure 1.2 provides a framework for completing this task.

A more anecdotal way of answering the question 'Does training matter?' is to reflect upon a number of very common training situations: Figure 1.3 provides some examples. A likely response to these situations will be that some suggest training ought to be significant, others that it is a waste of time. The alternative conclusion is that in each case a proper assessment of purpose, of learning effectiveness and of value for money is needed. A more subtle training cost to monitor is that incurred by poorly designed, badly directed training. This is the cost of learning irrelevant or incorrect skills, and of partial learning.

### Ideas Diary

(thinks)

If you want to compile an accurate picture of the amount that is being spent on training, complete the 'price list' below.

- | 1. Fixed capital  | £ |
|---|---|
| <ul style="list-style-type: none"> <li>• Building and training rooms.</li> <li>• Fixtures and fittings – chairs, tables, wall-boards, carpets.</li> <li>• Fixed services (e.g. aerial sockets, wired CCTV and computer links).</li> <li>• Equipment – audio-visual equipment, typewriters, word-processors, demonstration machinery, tools.</li> <li>• Provision of a training resource centre and/or library.</li> <li>• Motor vehicles.</li> </ul>  |   |
| 2. Working capital  |   |
| <ul style="list-style-type: none"> <li>• Consumable supplies (e.g. stationery).</li> <li>• Maintenance of equipment and premises (routine maintenance plus breakages).</li> <li>• Materials used during training (e.g. in metalwork, catering, assembly tasks).</li> </ul>  |   |
| 3. Administrative and personnel costs of the training function  |   |
| <ul style="list-style-type: none"> <li>• Cost of employment for the training manager and administrative and clerical staff.</li> <li>• Apportioned costs of rates, rent, heating, lighting, cleaning, etc. for training rooms or premises.</li> <li>• Salaries (etc.) of instructors/trainers when not engaged in development of training programmes or in giving instruction.</li> </ul>   |   |
| 4. Cost of providing instructors/tutors   |   |
| <p>This cost is that incurred in training trainers whether they are line managers, experienced workers, or externally recruited training officers. This cost includes the following:</p> <ul style="list-style-type: none"> <li>• Fees for external 'training of trainers' courses.</li> <li>• Marginal costs of attendance at existing internal courses.</li> <li>• Recruitment and selection costs.</li> <li>• Refresher and developmental training for established trainers.</li> <li>• Salaries and salary overheads, plus expenses during the training of trainers.</li> </ul> |   |
| 5. Cost of training development   |   |
| <ul style="list-style-type: none"> <li>• Salaries (etc.) of trainers whilst carrying out analyses of training needs, development of objectives and content for training activities, and evaluation of programmes.</li> <li>• Fees to consultants for similar purposes.</li> <li>• Expenses incurred in producing visual aids, printing of course materials, etc.</li> <li>• Computer time charges (for development of CBT).</li> </ul>  |   |
| 6. Cost of giving instruction   |   |
| <ul style="list-style-type: none"> <li>• Cost of trainers' employment</li> <li>• Travel and accommodation expenses.</li> <li>• Membership fees for professional associations.</li> <li>• Subscriptions to training journals.</li> <li>• Fees for external consultants.</li> <li>• Licence fees for use of copyright materials.</li> <li>• Guest speakers' expenses and fees or (if internal) a proportion of salary.</li> <li>• External course fees and expenses.</li> </ul>   |   |

7. Costs arising from participants' attendance at training events £

- Apportionment of salary or wages and employee overheads during attendance on course.
- Travel and accommodation costs.
- Cost of temporary replacement staff.
- Costs (where quantifiable) of lost 'output' due to attendance on course.

**Figure 1.1** Reviewing the true costs of training

	<i>Problem present (tick)</i>	<i>Best guess at cost (£ p. a.)</i>	<i>Cost in comparable organization</i>	<i>What it should cost (£ p. a.)</i>
<i>Operational penalties</i>				
Accidents				
Customer complaints				
Equipment downtime				
Equipment utilization				
Quality control failures				
Delivery delays				
Missed targets				
Lost sales				
Wastage and breakage				
Backlog of orders				
Market share				
Etc.				
<i>Personnel penalties</i>				
Absenteeism				
Grievances				
Turnover				
Promotable staff				
Training time				
Recruitment errors				
Etc.				
<i>Financial penalties</i>				
Overtime payments				
Failure to meet targets				
Rising overheads				
Excess inventory				
Costs per sale				
Penalty clause payments				
Credit control losses				
Etc.				

**Figure 1.2** Identifying where lack of competence may exact bottom-line penalties

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- Area managers keep talking about the need to 'motivate' their salespeople, but the real problem seems to be that they do not know how to close a sale.
- Training course descriptions are written in sociological gobbledegook – and you can't challenge them because almost anything might be interpreted to be a result of the training provided.
- There is a training course which your people are always keen to attend, but you are not at all sure what good it is doing.
- There's so many courses and training packages on offer today, how can you sort out the good from the bad?
- 'I wonder how other people occupy their minds while they're sitting through films like this?'
- Salespeople come back from a training event bubbling with ideas and enthusiasm, and a week later it has all vanished.
- There's only 20 or 30 seconds contact between sales staff and customers: what can training do to make the most of that contact time – and how will you know if it's had any effect?
- You want certain key staff to negotiate better on big contracts but the 'product' that your training department provides just doesn't match your expectations.
- 'This piece of equipment is the very latest in training technology. Therefore, you should ...'
- The financial director phones you: 'I know everyone enjoys these sales conferences you run, but I need something more specific to take to the Board to justify future spend. They still believe in training, but they need some hard evidence of what good it's doing.'

Figure 1.3 Common training situations

A working definition of good training is that it is an investment that yields identifiable pay offs in the form of better job performance. The answer to the question 'Does training matter?' is 'Yes, if it is good training.' And it is the notion of good training as the means to improved job performance that provides the link between corporate strategy and training strategy explored in the next chapter.

## 2

# The strategic context

For both managers and trainers within organizations, there are two central concerns about all forms of training. These concerns are relevant whether the emphasis is on the shop-floor or clerical level, on management development, or on board-level learning about new trends and concepts. These two concerns are effectiveness and value.

'Has it made a difference?', 'Was it worth it?', and 'Is there a better alternative?' are the three questions which underpin the strategy for, and evaluation of every initiative designed to enhance the knowledge or skills of people at work. Strategy is concerned with ensuring that the purpose and delivery of training activities is correct. Evaluation involves making judgements about the correctness of that strategy (including the means adopted), and particularly about the outcomes or specific benefits that the strategy delivers.

Strategy and evaluation are complementary and inseparable. There has long been a tendency to see evaluation as a toolbox of techniques – questionnaire, interview, etc. – for the assessment of training in isolation from its context. Much of what passes for evaluation can be summed up in the weary question, 'What did you think of that course?' However, evaluation carried through in a systematic way, with serious intent, not only provides an excellent feedback and quality control mechanism, but also necessarily raises questions about the role of training, the activities of managers, and the corporate mission. This aspect of the evaluation process also makes it a useful vehicle in its own right for setting change in motion. This element of strategy will be discussed later.

Central to the concept of strategy is the idea of purpose. It is the contribution that training makes towards the achievement of an organization's purposes that provides the justification for investment of resources of time, people and money in that training. Cameron<sup>1</sup> suggests a four-category framework for understanding organizational purposes. All organizations, except universities, fit into this framework. The four categories are as follows:

1. **Goal-directed organizations** which pursue specific targets (turnover, profit, market share, and so on) and measure their own effectiveness by whether those targets are met or exceeded.

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2. **Resource-acquiring organizations** which depend upon their ability continually to replenish key input resources. Examples include mineral resources for an extractive company, skilled programmers for a software house, or investment funds for a unit trust.
3. Organizations which characterize their own effectiveness primarily in terms of **internal functioning**, such as good internal communications, high levels of staff participation in decision processes, positive orientation towards quality issues, or low levels of internal conflict.
4. **Constituent-satisfying organizations** which exist primarily to serve the needs of a particular group (or groups) of people, for example, advice bureaux, workers' cooperatives, governmental organizations. Commercial organizations, too, may be responsive to their particular constituents – shareholders, consumer groups, employees.

Cameron's framework suggests that any specific organization will be predominantly directed by one of these purposes, although secondary purposes may also be a significant influence. From the perspective of training strategy, it is essential to pinpoint which purposes dominate in a given situation. In particular, it may be the case that officially stated corporate purposes receive only lip-service; it is also common to find a difference of dominant purpose between higher and lower levels in an organizational hierarchy. Senior management tend to concentrate on a goal-directed view of effectiveness; at supervisory level, internal functioning – in the form of smoothly-working teams, or inter-sectional harmony – often is the operational measure of effectiveness.

Corporate strategic purpose is the bedrock on which rests something as remote and detailed as a single learning objective within a particular training event. For example, in training salespeople to increase their effectiveness with customers by improving their listening skills, one learning objective might be '... will use reflective summaries to demonstrate understanding of customer needs'. It should be possible to show how that – and any other – learning objective contributes towards the achievement of some defined corporate purpose. As an aside, the connection must also work in the other direction. Defined corporate purposes – mission statements – only start to make a difference to work performance when they have been translated into detailed task requirements for individuals (the on-job equivalents of learning objectives).

When organizational purposes and training objectives are in harmony, training is a powerful contributor to organizational success. When the connection is lacking, training is a luxurious overhead which can reasonably be presumed unnecessary.

Use Figure 2.1 to review corporate purposes in your own organization and to review the extent to which training is contributing to those purposes.

A cynical view of the corporate mission statement argues that it is closer to being an obituary than a manifesto. The risks are twofold: that mission statements become bland generalities – 'motherhood' statements that change nothing and motivate no one – and that they become obsolete. All organizations today operate in a fast-

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1. What is the dominant form of organizational purpose? (Goal-direction/resource-acquisition/internal-process/constituent-satisfaction)
2. Are there significant differences between organizational purposes at, say, senior level and at, say, sectional level?
3. How is training responding to those differences?
4. What are the current top three priorities for the organization?
  - a)
  - b)
  - c)
5. For each current priority, list what contribution training is making and then what contribution you would like training to make.

Organizational priority	Training is contributing	Training ideally should be contributing
a)		
b)		
c)		

Figure 2.1 Training goals and organizational purposes

changing environment, and their definition of corporate purpose must respond: it has never been easier for a company to be prepared to fight the last war but one.

Insurance against blandness comes from a policy of actively pushing the translation of mission goals into workplace behaviours, at all levels. That alone goes a long way towards ensuring the relevance of training activities. Protection against obsolescence requires that corporate purpose is tested regularly against external reality, that the market drives the mission statement. Then, the mission statement – translated into workplace performance standards – can drive the organization to respond appropriately.

Most change is a fairly slow evolution in response to economic and social changes, though occasionally the pressure is urgent, following merger, or due to collapse of an important market sector. Similarly, most change is reactive – a process of adjustment to events – but sometimes it is deliberately engineered to pre-empt commercial disaster. Complacency about market position or poor quality of customer service may demand a shake-up; recruitment and retention problems may require a change in managerial culture and style.

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Unfortunately, it can be difficult to ensure that the ambitions for change in an organization are matched by appropriate means. Too often, the more grandiose the objectives for change, the more superficial the methods adopted. On the one hand, policy-makers may expect radical change to occur within patterns of organizational behaviour that have developed over decades, and expect it from brief, under-researched, and unreinforced 'training' events. Ready-made solutions are no solutions. On the other hand, trainers (especially external suppliers) collude with this unrealistic expectation, for the very human reason that there is much money to be made. 'Snake oil training' and 'blessing the crowds with a hosepipe' are two popular judgements from those on the receiving end.

In Chapter 4, the methods for achieving well-designed training will be outlined. The starting point, however, is in clear corporate purposes and a 'marketing' (as distinct from a 'selling') approach to training needs. In selling mode, the training function in an organization will have a repertoire of training activities which are presented (usually in the form of a 'courses brochure') to line management customers. It is implicit in this approach that these ready-made training events are in some way the fulfilment of the customer's requirements. Energy mainly goes into persuading the customer to commit to the proposed activity. And, as frequently happens with pressurized sales, there is a spate of last-minute cancellations. Course delegates are often unaware of the reasons for their attendance and 'happy sheet' ratings (questionnaires given to trainees at the end of the course) are not matched by changes in job performance. In time, people become very resistant to attending such courses. The funding of training comes into question. The more enterprising departments declare their independence from in-house training and buy in their own external suppliers. Ultimately, central training may be abolished.

The marketing approach starts from a very different position, an analysis of what the customer wants. It is driven by needs – and there are only two ways in which training needs can arise:

1. A person is currently under-performing due to a knowledge or skills deficiency: this is a *remedial* need to do existing things better.
2. It is anticipated that a person will need to perform tasks in the near future, for which that person lacks the required knowledge or technique: this is a *developmental* need to learn new skills.

The essence of the marketing approach in training, as elsewhere, is to identify the gap between what exists and what is wanted. When a training activity is designed in response to such a need, several positive results follow:

- Training content relates to job realities rather than abstracted principles.
- People undergoing training are much more likely to see the activity as useful and relevant – and therefore learn more readily.
- On-job performance improves.
- Measurement of improved performance becomes more feasible.

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Use Figure 2.2 to review the level of diagnostic activity in your own organization.

At the heart of productive training is the process of *diagnosis*: discovering by enquiry in the workplace just what it is that people need in order to become more effective in their jobs. An emphasis on observed work behaviour avoids several of the traps that invite ineffective training. Diagnosis starts with such questions as 'What are people doing (or not doing) that needs to be changed?', or, 'What would you, the manager, like to *see* people doing differently after they have been trained?' This sidesteps the trap of stating training needs in terms of the personality traits of an idealized occupant of the job: anything more than minor personality change is difficult to achieve, takes a long time, and lies outside the remit of training. 'Smith finds it difficult to get useful information out of prospects' is a much more useful diagnosis, on which practical training measures can be based, than any of the following statements:

- 'Smith needs to be a more outgoing person.'
- 'Smith is a bit short of motivation.'
- 'Smith needs a sales refresher course.'
- 'Smith has a negative attitude to customers.'

A behavioural approach also avoids the trap of talking about 'awareness' as a training goal. 'Awareness' is a weasel word which should immediately put any buyer of training services on guard. It suggests training in the 'nice to know' rather than 'need to know' category; it also implies that no practical consequences should be expected – awareness rarely translates into behaviour without specific encouragement; and above all it is a warning sign that there probably has not been a correctly targeted diagnostic stage in the training design. All too often, 'awareness' events are run when either trainer or client is not clear what it is that they are trying to make happen. Once that desired result is specified, the training can be used to develop knowledge and skills, rather than a vague awareness.

The diagnostic function also guards against a number of common but spurious justifications of training.

## WHAT IS NOT A TRAINING NEED?

### R & R

Training is sometimes provided as a perk of the job – a sort of rest, reward and recreation approach. The clearest indications of this are when discussion of training events centres upon the comfort of the hotels or the status that attaches to attending courses at a particular institution. Institutional ties are a particular giveaway. A common reflection of the R & R attitude is the question posed by managers to people returning from training activities: 'Did you have a good time?' This is not to argue that training ought not to be interesting and enjoyable, but to warn against the means becoming the end.

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1. Does *anybody* review training needs on a regular basis?

2. Which, if any, of the following diagnostic techniques are used regularly?

	<i>By trainers</i>	<i>By managers</i>
Performance appraisal discussion		
Career development review		
Critical incident method		
Behaviour observation		
Repertory grid		
Task checklists		
Analysis of performance data		
Internal consultant inquiries		
External consultant inquiries		
Firefighting		

3. Do you feel there is over-dependence on certain methods? Where might it be useful to introduce other diagnostic techniques?

4. Think about the whole range of training activities in the organization. List each activity under the heading (below) that most nearly describes it.

- a) Rest and recreation
- b) Solution in search of a problem
- c) Flavour of the month
- d) Making sure the budget is spent
- e) Part of pay, conditions, or industrial relations
- f) Acts of faith ('it won't hurt, it might help')

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g) A motivating experience

h) Something the boss has insisted on

i) Meets a clearly defined, job-related skill or knowledge deficiency

**Figure 2.2** Review of the diagnostic activity within an organization

### 'HAVE SOLUTION, WILL TRAVEL'

Trainers become very attached to particular programmes which they have developed and enjoy running. This is a positive bonus, so long as the need which the programme meets is a real need. However, over time the need may disappear, but the training course continues with a momentum of its own. At that stage, trainers are operating in a selling, not a marketing mode and training resources are not being efficiently allocated.

Ready-made solutions are particularly rife in the public-course market. There, the basic problem of matching product to need is made even more acute by the conflicting interests inherent in a course group drawn from different organizations and different levels of experience.

### FADS

'Flavour of the month' training has quite a long history. It is understandable that organizations want to know about new ideas and methods, although a reluctance to question the invisibility of the Emperor's New Clothes has sometimes been puzzling. Fads occur in training content and in training technology. The best insurance against heavily hyped trivia remains a sharply focused diagnosis of training needs, followed by a review of what would be the most cost-effective method to meet those needs.

### 'HAVE MONEY, WILL SPEND'

When a trainer with money to spend meets a supplier with solutions on offer, the result may be mutual happiness but it is unlikely to do much for bottom-line performance. In recent years fewer training budgets have had the necessary 'slack' for this kind of cheque-book training, but it is still possible to find organizations where training expenditure occurs without any systematic scrutiny. In one instance, a company that required a detailed investment appraisal of any spending on capital equipment over

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£5 000 regularly spent around £20 000 – on the basis of the flimsiest of analysis – to send a manager on a business school course.

## 'IT'S PART OF THE EMPLOYMENT PACKAGE'

The prospect of further training can be an attractive part of the recruitment package for all levels of employee. The principle is a sound one. Where it can go wrong is in the execution.

Where training is provided *primarily* because it is part of the employment package, the purposes of training are likely to be distorted. A similar pattern can be observed in organizations that adopt an unqualified philosophy of 'we believe in personal development'. The effect in both cases may be training for training's sake, without regard to organizational priorities. Sometimes, the training that is selected will be of considerable interest and use to the participants – outside of their work context – but of little or no relevance to their jobs.

The key principle to hang on to, where training is provided as part of the employment package or in response to an organizational philosophy of 'personal development', is that such training should still meet job-related needs.

## COUNTRY CLUB TRAINING

This approach to training is typified by the comment: 'It won't do any harm.' Implicit in that statement is the thought: 'But I don't expect it to make any difference.'

This situation is often found where managers have little interest in or understanding of training, and see their role as limited to making nominations for courses. This state of affairs is compounded by trainers who sell a menu of courses based on little or no diagnosis of needs.

Low expectations of training are matched by poor quality of training provision, in a downward spiral of indifference and ineffectiveness. No amount of tinkering will improve a hopeless situation. The only way to cut this Gordian knot is to close down the training function and restart it with new personnel who are committed to a professionally run, organizationally relevant training service.

## MOTIVATION AND PERSONALITY

It is common for training needs to be confused with desired personality traits such as 'having a good attitude' or being 'well-motivated'. Whether you like it or not, the fact is that training is not a process that can achieve substantial changes in personality. Training can change the knowledge and skills that people employ in day-to-day behaviour at work but personality change is the realm of the psychiatrist.

'Area Managers keep talking about the need to 'motivate' their salespeople, but when you go out with one to visit a customer, the problem seems to be that they do not know how to close a sale properly.'

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What has happened here is that instead of diagnosing the actual performance deficiency – the failure to close a sale effectively – the manager has decided that the problem lies in the *attitude* the salesperson brings to the job, that is, their lack of 'motivation'.

'Motivation' may sometimes be a valid target for training activity, but only in a narrowly defined sense. Managers often talk about the need to motivate their staff. Sometimes this is regarded as a matter of exhorting people to greater efforts, sometimes as a matter of leading by example. On other occasions it is seen as a matter of developing the right sort of climate in an organization, or the right package of incentives. All of these strategies have a role to play, in the right time and place, but none of them is in fact a *training* strategy. They are valid and useful tools of *management* and managers themselves sometimes need to be trained to use them effectively. This, however, is a quite different task from asking trainers to develop training activities that will motivate employees to better performance: this is asking trainers to do the managers' job.

Only one element of motivation can be treated as a topic for staff training: that element is *job-competence*. Whether or not someone feels motivated to do something depends to a large extent on whether or not he or she feels capable of doing it successfully. Hence, training which increases a person's ability successfully to perform job-related tasks will also increase that person's motivation to attempt those tasks. This is illustrated in Figure 2.3.

The central idea in the competence/motivation loop is that people are more willing to do things when they feel competent to do them. By providing training which increases skill competence, the individual is enabled to do the job better. By doing things more competently, the individual is rewarded not only by material results (e.g. higher sales) but also by an increase in self-esteem and confidence. This provides the motivation to do even better in future, and encourages further use of the appropriate skills. The more skills are used the greater the reinforcing (or motivating) effects of success. Beyond a certain level of competence, the individual may be able to bypass formal training and continue to increase competence by practice alone (Loop B).

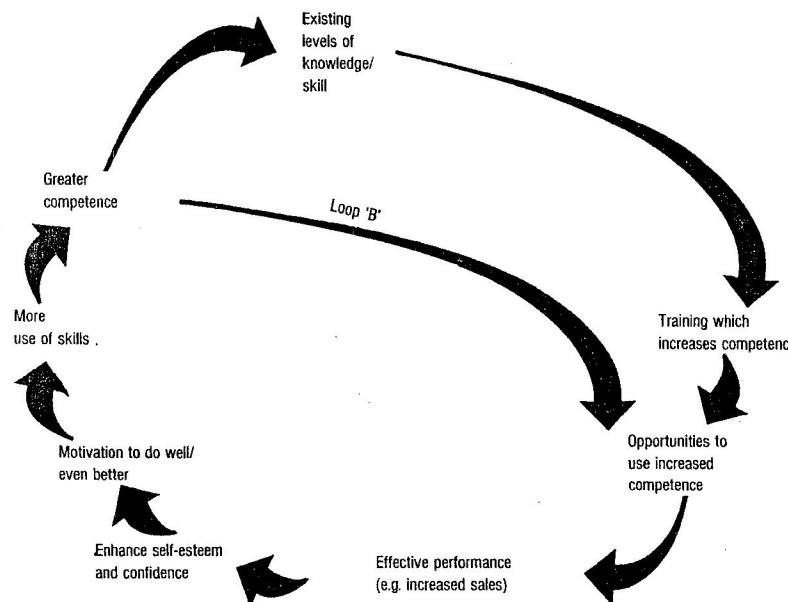
Within the competence/motivation loop, training certainly may lead to better motivated employees, but that motivation is a by-product of training concerned with *specific skill development*.

## SOLUTIONISM

Analysis of training needs is a constructive way of involving line managers in the training process. Managers are more likely to lend support to training for which they have helped to diagnose the need. However, one note of caution needs to be sounded about management involvement: the problem of 'solutionism'.

Managers are not professional trainers. Unless they are shown how needs analysis should be conducted, managers may engage in 'solutionism', that is, if a manager is asked about training needs the reply will usually be in terms of a *proposed solution*

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**Figure 2.3** The competence/motivation loop

rather than a *diagnosed problem*. For example, 'I think they all need some refresher training.' Or, 'What they need is a course in interpersonal skills', rather than 'They have difficulty in dealing with customer complaints face-to-face.' Effective needs analysis encourages the manager to work with the trainer to identify existing trouble-spots or potential future problems. This is a very different matter to prescribing ready-labelled solutions.

Solutionism often crops up during staff appraisals. An effective appraisal includes a two-way discussion of performance strengths and weaknesses, with possible alternative strategies for action being considered. Too often, this degenerates into a quick look through course brochures and a nomination for 'one you haven't done yet'. The need for improvement is lost sight of behind the course title.

#### 'THE MD SAYS SO'

This is a special case of solutionism. What makes it special is the organizational power and position of the person who originates the idea. In short, the training department cannot say 'no'. That said, there is still a lot of room for manoeuvre. If the MD or the chairman decrees that there must be, say, communications skills training for all employees, then the training strategist can quite legitimately conduct an analysis of

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the actual 'communications skill' problems that exist in the organization. There are bound to be some and relevant training can then be designed to meet those needs.

The worst response is to abdicate all responsibility, indulge in cheque-book training, and then blame the MD for having the idea in the first place. Nobody wins.

#### ENFORCED NEEDS: WHEN IS COMPULSORY TRAINING JUSTIFIED?

Compulsory training is most acceptable and effective when it is combined with a somewhat modified marketing approach. In other words, the training is based upon a thorough needs analysis, but does not rely on voluntary participation.

Training may be made compulsory for a number of reasons, the most legitimate of which are as follows:

1. Safety requirements.
2. As a possible way to remove the need for dismissal on grounds of lack of competence.
3. Where training exists at a low level of effectiveness and low esteem but efforts are being made to change this situation in ways which the 'consumers' will not appreciate until they experience them.
4. Where there is a low level of key skills across the whole organization (or within particular functions or occupational groups) and it is necessary to bring everyone up to a minimum level of competence.
5. Where ongoing training has been specified in the contract of employment.

However, it is always preferable to have voluntary and committed participants in a learning activity than to have reluctant conscripts. The adage about leading a horse to water applies with some force to training.

Use Figure 2.4 to analyse any particular training activity in your organization. It will help clarify the diagnostic basis of the training (or lack of it), enable you to identify the behavioural outcomes of the training, and start the process of thinking about the ways in which you can begin to answer the three core evaluation questions:

- 'Has it made a difference?'
- 'Was it worth it?'
- 'Is there a better way?'

### CONCLUSION

In this chapter, we have emphasised the close relationship between corporate strategy, successful training and evaluation. Corporate purpose needs to be tested regularly against external reality, so that the mission statement – graduated down in the form of work performance standards – can drive the organization (and its training activities) to respond appropriately. The common threads running through strategy, training and

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1. Training activity to be surveyed?
2. What current or anticipated job performance need does this meet?
3. What justification was originally presented for this training?
4. What would you expect to see someone doing differently after the training?
5. What, if any, evidence is there that the training has made a difference to job performance?
6. In your judgement, are the identified changes in performance such that they justify the time and money invested in the training?

## THE STRATEGIC CONTEXT

### NOTE

1. Cameron, K. (1980), 'Critical Questions in Assessing Organizational Effectiveness', *Organizational Dynamics*, Autumn, pp. 66-80.

**Figure 2.4** Training activity probe

evaluation are the importance of clear purposes (which provide both targets and criteria of achievement), identifying results, and assessing value.

An emphasis on strategy ensures that the design and delivery of training activities matches real needs. Evaluation is concerned with judgements about the correctness of that strategy (including the means adopted) and particularly upon the outcomes that the strategy delivers. Efficient training design is grounded in a market-driven diagnostic process that responds to strategic concerns and which, performed well, allows the evaluation process simply to certify the quality of training outputs rather than to prescribe remedial measures.

Chapter 3 outlines the conceptual framework for evaluation and Chapter 4 discusses in some detail how the elements of strategy, design and evaluation can be pulled together to enable the Human Resource Development (HRD) professional to 'get it right first time'. The design and development of an evaluation project for a specific application (such as a particular training course) will be examined in Chapter 5.