

# **Organizational Consultation XIX**

## **Development: Part Two**

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The training and education that organizations provide to their employees typically come from one of five sources: (1) professional trainers and educators from outside the organization, (2) professional trainers and educators who are employees of the organization, (3) trainers and educators who hold some other position within the organization, but occasionally provide training or education in the organization, (4) on the job training and education provided informally by other employees with more extensive experience and (5) on the job training and education provided by someone either inside or outside the organization who is designated as a coach or mentor. Organizational leaders often chose between these five sources on the basis of the specific delivery mode being used; thus, the four modes I described above closely relate to the sources of expertise (see Chart Two: Modes and Sources of Training and Education).

### **Source One: Professional/External Trainers and Educators**

Many of the most prestigious and visible training and education programs for many years have taken place off-site (Mode One) and have been conducted by professional trainers and educators. The National Training Laboratories (now called the NTL Institute) offered rich learning experiences at its summer programs in Bethel Maine, through workshops conducted by highly trained and internationally known experts in human relationships and organizational change. Prestigious universities, such as Harvard University, Stanford University and UCLA, have offered summer programs, executive programs and other continuing education programs for many years that are particularly geared for upper-level management in both profit and not-for-profit organizations.

Even more common use is made of in-house training and education programs. Professional trainers and educators are brought inside the organization to conduct a workshop or seminar. Much of my own work for many years centered on the provision of this type of training or education program. I would offer a two-day training program to the faculty in a medical school on giving and receiving feedback or a full week program to mid-managers in an energy company

on building effective teams. At other times I would offer a four-hour educational speech and follow up questions to government officials regarding postmodern organizations or a four-day educational program for bank executives on alternative models of strategic planning.

Given that the fees of professional trainers and educators can be prohibitive, especially if they are high profile, some organizations have formed consortia or strategic alliances in order to share the costs associated with bringing in these external trainers or educators. These collaborative efforts offer many advantages in addition to cost savings. Participants get to share ideas with and network with colleagues from other organizations and get to compare their own problems and perspectives with men and women from the same line of work, often in conjunction with the wisdom and insights being offered by the outside trainer or educator. These consortium-based arrangements have been particularly popular among organizations that share an interest in Total Quality Management and Continuous Quality Improvement.<sup>i</sup> Professional meetings and annual conferences are a form of inter-organizational collaboration, though formal consortia can often provide focused education or training to a targeted group of participants that have much greater impact than the keynote speeches or brief seminars and workshops offered at most association meetings.

### **Modes And Sources of Training and Education**

<b>Mode Of Training/ Education</b>	<b>Typical Source Of Training/Education Expertise</b>
<b>Intensive/Off-Site</b>	<b>Professional Trainers/Educators From Outside The Organization</b>
<b>Intensive/On-Site</b>	<b>Professional Trainers/Educators From Inside The Organization</b>
<b>Distributed/On-Site</b>	<b>Mixture Of Professional and Peer Trainers/Educators From Inside The</b>

	<b>Organization As Well As On The Job Training/Education/Coaching/Mentoring</b>
<b>Distributed/Just In Time</b>	<b>Mixture Of All Five Sources Of Training/Education</b>

The executive programs being offered at prestigious universities have traditionally been geared primarily for those working at the very top of the organization. High-level executives are attracted to these programs, not only because they are prestigious, but also because these organizational leaders can interact with others at a very high level. It is usually not very safe for these executives to interact with employees in their own organization and they often feel they have little to gain from training being offered by outside trainers and educators—unless these presenters have themselves recently occupied a position of considerable authority and responsibility.

The high level executives want the latest, cutting-edge concepts being offered by those who are doing the research and formulation of new ideas or by those who are enacting these ideas from the top of their own organization. In addition to attending executive programs at a major university, top-level executives are often attracted to programs that are exclusively intended for the senior executives. The Young President's Organization (YPO) has offered programs for CEOs who run companies at a very young age, while TEC offers programs for the executives of middle-size organizations. These programs tend to blend the talents of professional trainers and educators (Source One) with mentoring and coaching programs (Source Five).

Independent training institutions, such as the NTL Institute, have usually attracted employees from the upper-middle tiers as well as a few from the very top. In-house programs, such as I and many other trainers and consultants offer, are usually geared to the mid-level management of organizations, or to the young, promising employees who are picked to be the future leaders of the organization. It is very appropriate for these programs to be conducted on-site by an external trainer or educator, like myself. By offering the program inside an organization, I can take advantage of the rich dialogue about real-life problems that can take place in this setting. This advantage requires that I create a safe and appreciative setting for candid discussion to occur and that I gain sufficient knowledge of the problems facing the organization through pre-workshop interviews, questionnaires and document review. While the program can thus build on internal issues and dynamics, I provide a moderating perspective as an outsider trainer or education. I can relate the problems of the organization to broader trends and generic issues, and identify where this organization's problems are similar to or distinctively different from those facing comparable organizations. I thus provide something of a benchmarking function, and remain relatively neutral in moderating the dialogue that occurs.

While some training and education programs are offered by external trainers and educators to lower level employees, these employees are more likely to receive programs that are delivered by in-house trainers (Source Two) or peers (Source Three). In many cases, training and education is limited to on-the-job learning provided by other employees with more experience (Source Four). Unfortunately, the lack of externally based training and education often means that employees who are actually doing the work of the organization gain very little perspective on their work or on the organization in which they are employed. They typically are unable to fully appreciate the setting in which they work. They know little about how their own organization aligns with the broader marketing and economic forces that directly impinge on their organization and their own job.

Many organizational leaders complain that their employees are too narrow-minded. Yet these leaders do little to correct this parochial perspective. This failure to provide the external perspective to lower level and new employees becomes particularly troublesome when contemporary leaders seek to attract knowledge workers to their organization. This failure is even more egregious when high level administrators seek to empower their employees with the authority and responsibility for solving problems and making decisions. As I will discuss more fully in the following series of essays, effective empowerment requires extensive training and education—otherwise it is a sham.

### **Source Two: Professional/Internal Trainers and Educators**

Most large organizations, whether for profit, not-for-profit or governmental, have a full-time training and/or education staff. These trainers and educators typically hold at least a bachelor's degree and often have been awarded an advanced degree. They typically provide a wide range of programs. Some of the programs may be mechanical or technical. Others are likely to focus on managerial skills, such as supervision, planning, motivating, or conflict resolution. In many cases, these programs have been created by the training/education staff members themselves, often borrowing from programs they have attended outside their organization or from books or articles they have read. Publishing companies, such as University Associates, which is now part of the Jossey-Bass Publishing House, have been very successful in providing pre-packaged training programs, that can be used at very low cost by internal trainers and educators. Video-

recordings, training manuals and computer-based programs may supplement materials being prepared by the internal trainer/education,

In other instances, internal staff members have contracted with an independent training firm to provide programs that have been designed by the staff of this firm. Typically, the internal staff member attends certification programs being offered by the training firm. This program usually lasts at least two to three days and is often at least a week in length. Those training firms that operate in a responsible manner will use this certification program to not only convey the essential skills and knowledge about their program, but also to screen out unqualified or inappropriate users. Once certified, the internal staff member can offer the program to members of their own organization, usually at a certain cost per participant or per program. This approach to training and education blends the strengths of the external trainer (Source One) with those of the internal trainer (Source Two). It has become very popular and very lucrative for many training firms to offer this blended approach.

These externally designed programs have set the stage for new forms of just in time training and education, to which I turn below. These programs have also increased the need for follow up services. In many cases, the prepackaged materials being offered through these training firms doesn't fit with the specific issues being faced by an organization. As a result, there may be limited application of course principles and practices. The transfer of learning to the real work place may be marginal. Follow up services can take many forms. Checkup sessions can be held several months after the program has concluded. Case conferences can be held, where graduates present real life problems that concern the application of principles and practices from the program. Colleagues in this case conference can assist in identifying application strategies. Individual coaching can be an even more effective follow up strategy. A coach that operates from inside the organization can often be of great value in working with graduates of a prepackaged training program. Coaches can help graduates identify ways in which the principles and practices of this program can be applied inside the organization, as well as help graduates retain and transfer lessons learned in the externally designed program.

### **Source Three: Nonprofessional (Peer)/Internal Trainers and Educators**

Smaller organizations have always had to rely on employees who occasionally offer training or education services, while also serving some other function, most of the time, in the organization.

A senior administrator with fifteen years of experience in a small manufacturing firm might offer a two-day program for new managers in his organization regarding supervision and delegation. A member of the accounting department might similarly offer a four-hour session on budgeting, while the affirmative action officer presents a series of two-hour luncheon seminars on the ten steps in hiring a new employee or five ways to handle difficult employees. This third source of expertise is indispensable to the small organization primarily because it is affordable. No permanent members of the HR staff are required, nor does the organization have to pay high salaries to professional trainers and educators with advantaged degrees.

In recent years, many large and small organizations have discovered that there are advantages associated with this third source—other than just cost. The skill and knowledge of professional trainers and educators (Source Two) is valuable in any organization. These men and women can provide the broad perspectives and neutrality that is usually associated with external trainers and educators (Source One). There are many drawbacks, however, in relying on professional HR staff members. They often lack credibility and the resources they offer might not be very applicable. The professional staff members in a human resource development department often lose track of organizational realities. Typically, these men and women have spent many years in the training and education business. As a result, they have forgotten what it takes to actually administer a department or grapple with the political forces operating in the building of a program budget.

In many cases, members of a professional development staff have never actually worked in any job other than training and education. They may have been hired straight out of an MBA program and have spent their entire professional career mouthing words they heard or read in their graduate program. They are clones of business school professors who have minimal real world experience and who offer words of wisdom that outdated, impractical or geared to very different kinds of organizations. Alternatively, the trainer served for ten years as a high school literature instructor and was hired five years ago because of her experience as a teacher and curriculum designer. She doesn't know much about business practices but does know how to write an educational objective and facilitate a classroom discussion.

There is an alternative. The HR department can engage someone as a trainer and educator, on a part-time basis, who has fresh, first-hand experience in actually making use of concepts and tools being introduced in the training and educational programs of the organization. These peer

trainers and education can insure that the instructional material is applicable to the actual conditions of the work place. Furthermore, they have credibility, having “been there and done that.” They can speak with authority regarding the use of a specific tool, as well as tell stories about real events that have occurred within the organization—stories that illustrate or validate a specific principle or abstract model.

It is often very effective to team up a professional trainer/educator (Source Two) with an experienced employee (Source Three), so that they might co-teach a specific element of a program. This strategy not only provides the participants with several different perspectives, it also reduces demands on the part-time trainer/educators regarding both preparation and in-class instruction. The peer trainer/educator might also be teamed with an external trainer/educator (Source One). This usually provides an even greater contrast in perspective and yields a two-fold credibility. The external instructor offers expertise and neutrality, as the prophet from another land, while the internal employee offers the credibility and practicality, as the insider who knows the territory.

I often urge organizations with which I work to set up this alliance between Source One and Source Three expertise. Both sources benefit from this alliance. I can more readily make use of case studies and role-plays when I partner, as an external trainer/educator, with a part-time trainer/educator. I am working with someone who can ensure the applicability of these cases and role-plays. Conversely, the part-time trainer/educator will inevitably learn much more by co-teaching with me than by being a passive participant in some off-site training/education program. This is a case of learning-by-doing. I often find that the employee will soon be able to teach much of the material I have presented in a manner that is fully engaging to her colleagues within the organization.

There is yet another long-term benefit associated with the alliance between Source One and Source Three. This benefit concerns sustainability. With this alliance, I can slowly disengage from a specific training/education program. The training/education is now being offered by the peer trainer/education. The organization can continue to offer the programs I first introduced without having to pay any more for external training/education. Typically, I will meet once or twice a year with the peer trainer/educator after they have assumed responsibility for the training/education so that I might update them regarding new concepts or practices. When the training/education is handed off from Source One to Source Three, there is a much greater

probability that this training/education program can be sustained. Even without money exchanging hands, the peer trainer/educator—and the peer trainer/educator’s department—will inevitably benefit from the peer instructor’s exposure to other departments and to organization-wide issues. Without the need for substantial training/education funds or the need for professional HR staff members to provide training/education, these peer-based programs can be sustained—despite the vagaries of training budgets, shifts in educational priorities, or changes in the training/education staff.

In selecting employees who are qualified to offer peer-based training and educational programs, the leaders of an organization can take full advantage of one of the other six appreciative strategies being featured in this series of essays, namely, the human resource bank. The director of a human resource management office or members of a training and education committee can readily make use of information that has been gathered for the human resource bank regarding the distinctive strengths, skills and knowledge of each employee in the organization. The HR director might wish to find someone who is fluent in French and experienced as a teacher. The HR committee might search for someone who is knowledgeable about grievance policies in the organization and has substantial managerial experience. A human resource bank can provide information to both the director and committee. This bank can be of great value to the leaders of an organization who wish to not only create an appreciative organizational culture, but also make extensive use of this third source of expertise for their training/education programs.

#### **Source Four: Informal (Peer-Based) On The Job Training and Education**

Despite the challenges associated with our contemporary 21<sup>st</sup> Century world, most organizations still provide nothing more than informal training and education to new employees. At most there is a brief orientation program, following by a breaking-in period, during which older employees with more extensive experience teach the new employee. There usually is some tolerance for rookie mistakes and an informal expectation that the older hands will take the new employee under their wings in order to show them the ropes.

While this form of training and education takes the least amount of money and minimal preparation, it is flawed when used exclusively for the orientation of new employees—let alone the ongoing training and education of employees. Old patterns of work get reinforced, whether

successful or not. New employees learn survival skills that enable them to get by on the job. These survival skills usually can be learned without much effort; however, they may not necessarily produce maximum efficiency, nor are they likely to give the new employee a sense of personal fulfillment. The complexity, unpredictability and turbulence facing contemporary organizations, and the unique interests of the new knowledge worker, are simply incompatible with this fourth source of training and education resources.

This does not mean, however, that informal training and education is of no value. Some of the more adventuresome and appreciative leaders over the past thirty years have made extensive use of these informal sources of learning when instituting job rotations at the very top of their organization. The vice presidents of an organization, for instance, might rotate every six months or year, with the vice president for finance moving over to operations, the vice president of human resources moving to finance, and the vice president of operations moving to human resources. Each of the vice presidents learns about the ways in which each unit in the organization operates by taking charge of this unit for a limited period of time. While administering this unit, they learn from their subordinates as well as the other vice presidents who previously administered this unit. There is always a learning curve and each of the rotating vice presidents acquires a broad perspective on the organization and a fuller appreciation for the way in which their organization operates as a comprehensive system.

Many contemporary executives would probably suggest that this job rotation model is only appropriate in an organization that has been quite stable for many years. They might even declare that they already have too much to learn about their current job, given the unpredictability and complexity of our contemporary world. They don't need to tackle an even more imposing task in learning how to perform several other jobs. Other executives, however, have often pointed out that job rotation is an effective strategy for breaking out of the departmental silos that dominate many organizations. Furthermore, the primary role of a vice president should be broad overview and interdepartmental coordination. There is not that much to learn about the other departments that one would not have to learn anyway to be effective at this level of operations in the organization. Thus, at the very top of the organization, informal (Source Four) learning might be very appropriate.

Informal training and education can also be extremely valuable at lower levels of the organization, when it is coupled with one or more of the other sources of training and education.

As I noted above, many organizations have come to recognize the effectiveness of dispersed education (Mode Three) and are beginning to recognize the potential use of just-in-time training and education (Mode Four). Both of these modes require the presence of on-the-job learning resources. Dispersed training and education is most effective when the new employee, or an employee taking on a new assignment or job, learns not only in the classroom, but also from colleagues in the workplace. Similarly, just in time learning requires that colleagues assist in identifying the learning needs of an employee and in identifying the best time and place in which to obtain the necessary skills or knowledge. We often don't know enough to know what we don't know. We must turn to our senior colleagues for their advice and guidance. This is the best form of informal training and education, and it is invaluable in contemporary organizations.

### **Source Five: Formal (Mentorship/Coaching) On-The-Job Training And Education**

While mentoring and coaching are often considered the newest thing in contemporary organizations, they are also representative of a very old mode of training and education. They emulate the role played by master craftsmen during the early Modern Era in the preparation of apprentices. Today, many organizations are beginning to offer mentorship or coaching services to its younger employees or to employees who have taken on a new job assignment. I more fully describe these roles below (the ninth developmental strategy),but wish to reiterate that mentoring and coaching can significantly increase the enduring impact of those training and education programs that have been offered through any one of the first three sources of expertise.

When used in conjunction with any of these first three sources, mentoring and coaching help to anchor the learning that has occurred. Both mentoring and coaching increase the retention and transfer of learning and motivate employees to learn additional skills through both formal and informal mechanisms. When used in conjunction with either the external/professional or internal/professional source, mentoring and coaching hold an additional advantage. Both roles help an employee translate the more general concepts and tools being offered by the professionals into the everyday language-of-application that is to be found in their own specific work group.

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<sup>i</sup> William Bergquist, Julie Betwee and David Meuel. *Building Strategic Relationships*. San Francisco: Jossey-Bass, 1995.