



Implementing Change From Within

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Introduction and purpose

Most organisations will have experienced the scenario of implementing some form of training or “change” initiative that delivers little or no tangible results. The time, resources and finances committed are lost, mediocrity reigns supreme and the goal of world-class performance improvement remains unrealised. The purpose of this paper is to explore why this happens. To explore some of the most common issues and challenges that must be addressed, and understand what is required to deliver consistent and sustained results from “internal” training and change initiatives.

Context

The term “Change” is used a lot in the business arena. For the purpose of this paper, the term refers to initiatives that seek to deploy new working practices across an organisation which require an element of training for the target population.

Background

Successful organisations are built upon a combination of sound financial management, understanding the customer market and maintaining competitive advantage. Economic and cost base fluctuations, evolving customer expectations and new innovation demand regular appraisal of strategic plans. Organisations have to adapt to ever changing circumstances and ensure that their people are ready and capable to meet new challenges.

This has never been so readily apparent as in recent times. The global economic downturn has affected virtually every business around the world. Forecasts have been revised, customer requirements are changing and there is added competition for funds from within the customer base. You only have to look at the evidence of the global car market for evidence of this:

- Double digit fall in production
- Increased focus by customers on smaller more economical vehicles
- New car sales have crashed as people become more cautious with their money.

As a consequence of this harsh environment, businesses across all industry sectors have had to revisit their strategies. Restructuring, downsizing and reorganisation have replaced merger, acquisition and expansion as the hot topics in boardrooms. The only common denominator is, that whether you are expanding or contracting as a business, your people will need new knowledge and skills to meet the challenges ahead. But this raises the question of where the appropriate knowledge and skills come. Often there is no appropriate solution from 3rd party training providers available. Sometimes companies will have developed their own processes; methodologies or skill sets or simply identified pockets of excellence within the business, which they wish to inform the development of a training solution. These scenarios require a solution to be created “in-house”.

A case study

Before the economic downturn, a major challenge for businesses was employment of people. With plenty of opportunities in the job market, it became increasingly difficult to attract and retain talent. After all, recruitment is costly and it takes time for new people to become productive. This was the challenge for a managed services provider of volume workforce solutions, who, for the purpose of this whitepaper we will refer to as Company A. The market demanded low cost and high productivity from suppliers. So to meet customer expectations and deliver an operating profit, Company A needed to improve overall levels of performance in recruitment and retention of workers. Some parts of the business were very successful at attracting and retaining people whilst other parts of the business under performed. Therefore it was decided to develop a solution from within, informed by best practice, to be rolled out via training across the organisation.

This is not an uncommon approach - especially if, as in this case, there is no available solution via a 3rd party provider. On the face of it, Company A were simply choosing to introduce a best practice process where none had existed before. However, this approach means creating a behaviour change programme from the ground up. To be successful and ensure consistent and sustained performance improvement it requires:

- Validation of best practice
- Design of an appropriate training event
- Commitment from senior managers and the compliance of the target population
- A mechanism to measure and report on performance improvement
- A means to reinforce learning post implementation.

Indeed, this approach requires a significant commitment in time and resources. For Company A, this meant hundreds of man-hours dedicated to developing and organising the solution prior to rollout. A working party was appointed to develop the new process and subsequent training programme.

From start to finish it took 18 months to create and rollout the new recruitment process. Company A faced many challenges in developing the content and delivering the solution. Most of these challenges were not unique to this particular case but are representative of the “typical” issues associated with rolling out any large-scale training or change initiative. The following sections focus on looking into these challenges in more detail.

Project set up

Developing and rolling out a new training solution is a complex piece of work. There will be many issues and influences that need to be addressed. Consistent and sustained results require a considered and professional approach. This involves four key stages:

- Stage 1 focuses on the content of the training - designing and validating the event, informed by the project deliverables and a thorough needs analysis of the current situation.
- Stage 2 focuses on the process of the training – ensuring that the implementation runs smoothly and expectations are set.
- Stage 3 is the training rollout and initial check that knowledge / skills transfer has taken place.
- Stage 4 focuses on workplace integration, reinforcement of learning and measurement of change.

Working parties

Depending upon the complexity and volume of work to be undertaken you may wish to appoint a working party responsible for implementing the project. However, this creates an issue in itself, as anyone involved will also have a day job to fulfil. So be realistic around timelines – these will usually stretch, as day-to-day work issues get prioritised. Consideration needs to be given to who is best qualified to participate in the working party. Those appointed will need a clear mandate and expectations will need to be set with their line managers regarding the commitment and priority of the work that is being done. Ideally the balance of the working party needs to include:

- Someone in a position of influence who has the authority to drive the initiative forward
- People with good problem solving and analytical skills to conduct needs analysis and overcome implementation issues
- Representatives of relevant functional departments to provide domain expertise
- A mix of managers and subordinates to ensure that issues are identified and opinions canvassed at all levels
- People with a vested interest and peer influence from within the target population – this will help with buy-in.

A danger when appointing working party members is selecting the appropriate people and not simply those who appear to have more time on their hands or who are less crucial to the day job. This point is especially important when asking line managers for nominations. They may be influenced more by the inconvenience to the business than the deliverables of the project. Once a working party is appointed they then need appropriate direction.

The project brief

The starting point for developing any training initiative is a well-prepared brief. People need to understand the scope and deliverables of the remit. It should describe what the project is about and equally important – what it is not about. This provides clarity of purpose and minimises the risk of deviating from the intended scope of the project. The objective for the Company A working party was to “design and deploy across the business best practice processes, to attract and retain appropriate candidates to meet the people needs of our customers”. Certain criteria and deliverables were also outlined, including:

- The process must reflect all legal and regulatory obligations
- It should compliment / replace existing management information and not create duplication of work
- The scope of the remit extends to marketing
- The scope of the remit does not extend to performance management.

Whilst the above points are only a snap shot from a very detailed brief, it illustrates the need to consider the influences that may arise during such a project and the need to focus effort in the intended direction. Beware of assumptions and allow for a thorough needs analysis to be carried out. Assumptions in the boardroom regarding the detail of specific issues, may not be fully representative of what the actual problems are at the sharp end. In all likelihood the truth will lie somewhere in the middle. Therefore allow for thorough needs analysis to take place. This facilitates the development of an appropriate solution and gives validity to the work of those involved.

Needs analysis

One of the key challenges facing Company A was the absence of a formal recruitment process. This meant that across operations people were doing different things and had different opinions about what ‘best practice’ looked like. The key point here is that needs analysis must be as objective as possible and not based only on subjective opinion. Through management information, it was possible to identify those locations that had the best performance in attracting candidates and those who were best at retaining staff. To establish the basis of the solution the following questions needed to be answered.

- What influence did activity levels have on performance? After all, high activity levels can disguise mediocrity. In some locations there was a correlation between high activity levels and performance. Others performed as well without such a high level of activity.
- What are people doing differently in the best performing locations and how can we replicate it? This was down to a combination of marketing approach, applicant / staff care, and communication process.
- How do we replicate identified best practice across the business? This was achieved through the development of a formalised process supported by reporting tools and implemented via training.
- How do we validate our conclusions? This was achieved through piloting and refining the solution prior to rollout and measuring management information collated from the reporting tools.

Practical challenges

Researching, designing and validating the solution had an impact on the Company A working party. Whilst people supported the principal of the initiative, it was not easy to reconcile the sacrifices that had to be made to achieve the desired outcomes. The project became a major distraction to the pressures of the day job. The expectation was that those involved in the project had to “find the time”. However:

- This was specialist learning and development work unfamiliar to the group
- They had no template on how the project should proceed, so confusion and conflict set in
- Line management did not prioritise time for the people involved in the working party
- Timelines stretched far beyond reasonable expectations.

Company A had underestimated the commitment necessary to develop the solution from within. At senior level people began to question the short-term impact this project was having on the business. Line managers were unhappy about the time their people were spending on the project and moral within the group sank sharply.

This raises two important questions for anyone considering this approach to training:

1. Do our people have the expertise to design, develop and rollout a complex training initiative?
2. Can we afford the commitment in time and resources to do this properly?

Consequently for Company A, momentum was lost. The credibility of the project had been compromised and along with it, support from key personnel. To overcome this, Company A began to look elsewhere for solutions. However, the fact remained that this was a unique requirement with no appropriate solution available from external consultancies or training providers. If there had been a supplier who specialised in developing and implementing training solutions based on client content, this would have been a very attractive alternative. Had it not been for the direct intervention of the Managing Director, the initiative would have failed at this point.

Implementation planning

Eventually momentum was re-established and the project progressed. A new process was defined and HR designed a training event to support the rollout. IT and finance collaborated on the development of supporting tools and the solution was finally piloted 11 months after the project started. However, this was not easily achieved:

- Designing the event architecture and developing the materials was a lengthy process. The time available to complete these tasks was a scarce resource as it competed with other calls on the time of HR&D.
- Many of the target population were from Eastern Europe, materials needed to be translated as very few people were proficient enough in English to benefit from the training event.

This highlights the need to fully understand what might get in the way of implementing change. Negative influences beyond the scope of a project must be identified and pre-handled to avoid initiatives stalling. For example:

- How will people react to the change? Buy-in is crucial. People need to understand the relevance and benefits of change in a local context, whether by department or country, to fully endorse centrally imposed decisions. Expectations need to be established around what is required of people and realistic timelines set to achieve specific goals.
- What impact might people and departments beyond the target population have on the success of the project? And what might they need to know and do differently to support change? To achieve functional alignment you may need to consider subsidiary events briefings to prepare and educate a wider audience.
- What else is on the agenda that might get in the way? Consideration needs to be given to competing priorities - both strategic and local.
- What needs to be in place to ensure post training integration back in the workplace? Access to post training knowledge and skills reinforcement should be available to delegates either directly or remotely via coaching.
- Appropriate measures need to be defined and a reporting mechanism established to monitor change and diagnose any performance shortfalls.

The key point here is that all of the above needs to be considered at the point of implementation planning. Failure to pre-handle blocks to progress may have serious consequences on the success of a project. This area requires a high degree of expertise, which raises the question: “Is it reasonable to expect our people to do this effectively?”

Training rollout and integration

The target population for the Company A rollout amounted to 112 individuals. Twelve two-day events were arranged over a two-month period to complete the rollout. However, commitment from delegates was weak and issues arose around work place integration. Specifically:

- There was only one trainer capable of delivering the training. This meant that the rollout had to be implemented sequentially
- Those managing the target population of account managers and consultants were not up to speed with the new process and did not prioritise its implementation. Consequently events were postponed
- People were suffering from change fatigue. This new process followed a string of other change initiatives, driven from head office that had come and gone
- It would require a significant investment of time, to populate the new reporting tool with current workforce information. This needed to be done at the local level and impacted on day-to-day operational duties. To appease angry local managers, it was decided that the trainer would “lend a hand”. This meant several days of the trainer’s time and more postponements
- No concessions were made for those who were from Eastern Europe. Delegates struggled to cope with the training. Many left having learned little and feeling despondent and most reverted to their own local approach within days.

Unfortunately, the credibility of head office, the trainer and the new process were damaged at the point of rollout. This meant that adoption of the new process was enforced from the centre rather than endorsed by operations. Performance improvement was eventually achieved, but not as quickly as it would have with the voluntary enthusiasm of a motivated audience.

Company A did consider measurement and reinforcement. Each week reports were generated which highlighted each locations performance against specific measures associated with recruitment and retention of workers. Reinforcement was an issue – with limited people resources it was decided to dedicate a section on the company intranet. This included event materials, exercise to reinforce learning and a blog. However, this was voluntary not mandatory and not used very much.

Cost

Whilst it is not possible to put a figure on the cost of this initiative, it is fair to assume that it runs into hundreds of thousands of Euros. The man hours committed by the working party, travel and accommodation costs for delegates travelling from Eastern Europe alone will account for this. Additionally there was:

- The cost associated with the delay in performance improvement as the project over ran
- The time spent at board and other meetings dealing with the problems rather than focussing on the business
- The damage to “central” reputation as the initiative faltered from one stage through to the next.

Conclusion

In conclusion, Company A did the best job that they could, given the experience and resources available to them. The content of the training solution was perfectly OK but the execution of the project was not. This leaves us with two final questions:

- Is it reasonable to expect individuals, not familiar with implementing training and change initiatives, to foresee and address all of the issues that might arise? - Probably not
- Is it reasonable to expect companies to get strategically significant training initiatives right first time? – Yes definitely, if they want consistent and sustained outcomes to be achieved.

As mentioned earlier, Company A had no choice but to “go it alone”. There were plenty of training providers ready to sell Company A training courses, but no one who could help them to create and implement an Company A training solution. There is now an alternative available to companies in similar situations.



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