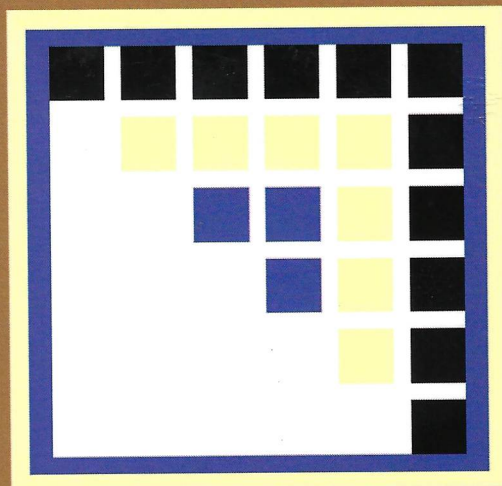# Managing Through Training

A Common Sense Guide for Non-Trainer Managers

Richard Cavalier

Introduction to the Third Edition

An introduction to a new edition of any book usually includes changes that time or rethinking have caused. That's not appropriate with "Managing Through Training" ("MTT") because it's a skeletal primer for further work in meetings/training programming. Skeletons survive constant changes in ideas. "MTT" introduces basic information and tested methodology for conveying information efficiently and surely to persons and groups. However, it is not a 'traditional training' text.

"MTT" readies neophyte training directors who have been assigned the task but have little or no formal training, so, it enables them to preview and tap into the ideal system for control of training programs: the US Navy's original PERT System (Program Evaluation and Review Technique). PERT controlled the development of the Polaris submarine; so it can probably handle your needs, too. This writer created the world's first PERT Diagram for visualized calendar control of local programming.

A related construct/control system, Instructional Systems Development (I-S-D) was developed by the Navy and was long ago proved at hundreds of military posts around the world. Consequently, ISD specialists can solve their own post's problems without recourse to a central controller. If Navy- ISD's strict requirements are honored in your preparations, then the resulting program structure will be fool-proof . . . .   All of the services, use their own allied systems, of which the Navy's version won the award in an all-services competition. All are valid and tested in use!

Many versions of the Navy's PERT now exist; some are taught at colleges. Some proprietary discs(fill in the blanks) have 'simplified' PERT's demands, which can introduce unrecognized and/or untraceable errors—and, therefore, negate the fool-proof aspect. Know the limits before buying, if .

"MTT" is intended (as its subtitle makes clear) for non-trainer managers who are required to prepare agendas and oversee fulfillment/production of the training programs that fulfill their own overall objectives. You could be the meeting-caller or a stuck-with assistant. "MTT" provides a basic understanding of the communication/education needs of your meetings and/or training programs so that you can talk more confidently with those ISD-professionals and -specialists who will demand factual information and precise statistics. You'll learn why if you pay attention. You'll gain, long term, too.

Your best help: the Navy's ISD system. If you need help, seek a military-ISD specialist, by hire or gig. ISD is a demanding system; it provides templates and algorithms that, if its strict dictates for factual information are honored, will deliver a foolproof ultimate program. In that sense, "MTT" is a prep book for Cavalier's "Common Sense ISD" ("CS-ISD"), which converts the entire Navy system and military jargon into more-useful business terminology.

Other helps are available at colleges and on the market (see the "Afterword" section). No, "MTT" alone will not make you an instant genius! Sorry. Yet, the Navy's original ISD will make the path to your eventual expertise sure and far less rocky, as will our "CS-ISD," which is based on

ISD.

The single most useful item for casual trainers is probably the PERT Diagram, which is a visualized control chart. Its central, calendarized delivery arrow is accompanied by multiple committee lines, arrayed in parallel above and below the delivery center, in delivery-order, on the central arrow. Enlarge and hang any military branch's generic PERT Diagram. Jot specific tasks and delivery dates on your copy's appropriate committee/function lines. Or make your own on our book's model.

A PERT Diagram for meetings control appeared in two Cavalier books, "Achieving Objectives in Meetings" (1973; creating that title phrase, now generic) and, slightly enhanced, in "Sales Meetings That Work" (Dow Jones-Irwin; 1983). Although our PERT Diagram was not a part of the earlier editions of "MTT," it is being added to this Introduction because it's so useful to visual control of the basic programming process and the countless pieces of your future programs. Use it! If PERT controlled the construction of the Polaris submarine and, it will probably be able to handle your programming, too.

Why use a military program for business? Because it works! When Training Department staff are ISD-competent, user-managers from other departments need be only ISD-conversant, so as to provide requested info. Involved persons can benefit from reading "MTT," too. Clear communication avoids a duplication of skills. Become conversant via "MTT."

If you choose further to develop your related communication skills, "MTT" is your gateway. Most discharged military ISD specialists become corporate trainers or consultants and can solve any related problem that you can present. Locate a specialist. By ad, if necessary.

Significant in the evaluation of any training skill itself is the fact of its allied uses, not just the fact of owning the skill. Sales and marketing programs probably provide the greatest need for that skill. The need could be intellectual and/or physical. Practice of the new learning in 'protected' classes, rather than uncoached in the field, is wise.

Example: "MTT" presents a typewriter/computer example as a matter of a neutral marketing tool, applied, despite requiring personal judgments. The book then guides you to an evaluation of the ways by which you might convert services for clients and prospects into sales tools, through original training programs. Later, given a working program, you will better appreciate the value of the training discipline. Guides that the author and his reader-users have proved to be effective will appear as thought-guides in this book. Use any as-is or edit-as-needed. But don't eliminate items arbitrarily, even if you think that they don't apply, this time.

Once you understand that the meetings/training line is a continuum in most instances, you'll be preparing yourself to conduct the most productive meetings and training sessions that you've ever hoped for—with measurable results.

An industry magazine once printed a critical line that said, regarding ISD, that "There's no 'there' there." There is a 'there' there! (See the "Afterword," which will be better understood after this earlier text has been digested.) ISD delivers foolproof programming! Even that magazine knows that reality now—because of immediate user/reader objections and fight! Retraction; then a new and prior reader peer-review system for proposed articles. Reader consensus: "Any failures with ISD are the fault of the [company] designer, not the system!"

You can reach that fool-proof 'there.' To reach it, you'll need to commit to do whatever hard work is required to master the ISD discipline at whatever level of expertise serves your (or an assistant's) needs best! At minimum you will become ISD-conversant and open to its methodology. No matter the skill-level that you choose to reach for yourself, let "MTT" start you in the right direction.

Then take charge and stay in charge!

END

Chapter 1

Why Train in the Market Place?

Training is becoming an indispensable tool in the sales, marketing, public service, and post-sales assistance and service kit of aware marketing, staff, and line managers. Whether it's a product or service that's being sold, whether high cost or low, training input is becoming essential because everything is being done through people who must already understand or be given the needed understanding.

Not all marketing managers comprehend the situation in those terms. More to the point, not all training directors understand the new needs and opportunities. If so, how could they help the advanced but needy manager? The revolution in the marketplace need for instruction can trigger another in the function and status of the training director and the training department: from programmable servant to program originator, from reactive viewpoint to pro-active vision, from utility cost to potential profit center. The company must accommodate that revolution in order to hold good employees, as well as to remain competitive in the market place. All personnel must accommodate that need.

Changes depend on your willingness and ability to look at the exterior training need with a marketing executive's eyes, too. The need to train in the marketplace arises from numerous causes, including legal liability; some of the training functions will likely remain a Human Resources/Industrial Relations area of responsibility. Yet many more instructional functions are being moved out of the industrial relations sphere and into the marketing arena by mother nature: both a) the intrinsic demands of complex products and services unusable with special instructions and b) also the pressure to out-perform competitors in service provided to back up those complex products and services.

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Let's examine some of the needs and their origins.

In the Fabulous Fifties, there was virtually no user-assistance life after sales; and there was no service life except that granted by the parts-only equipment warranty, with labor to be paid by the owner. But the consumer revolt of the late 60s and early 70s changed all that.

Post-sales responsibility has changed radically for all sellers. With the demonstration in the courts that companies have liability in certain circumstances regardless of printed disclaimers, the post-sales obligation came into focus. When court awards proved that key corporate executive and members of boards of directors could be held personally liable regardless of precedents of their shielding, the needs became personal as well as administrative.

The concept of consumer rights for individuals undoubtedly extended to business-to-business transactions some of the same expectations of the implied warranty of fitness-for- use of the product. Understandably, some companies moved to improve their post-sales assistance and service for purely defensive reasons.

However, many organizations began to discover that consumer relations in general improved when the company viewpoint shifted from "What's our legal obligation?" to "What will assure the satisfactory performance of our product/service that's reasonable?" Often the answer was simply information; but with increasing frequency, it's become *instruction*. That requires a further shift in viewpoint for the company.

During the early stages of the consumer revolution, customer service departments with authority to act on problems were created in countless organizations. Some companies even established and published toll-free telephone numbers to their service office. The legal rationale for concern and aid is now long-established, but the laws regarding its defensive stances are inadequate to the underlying problems and trends. Keep in mind that the written responses above are essentially superficial:

problems are solved by people. While problem resolution is a legitimate response, it cannot be an <u>only</u> response to market needs because it is narrow and prejudicial: it occurs only after the fact of dissatisfaction. To <u>eliminate</u> foreseeable problems and minimize the rest, the company must provide advance information and instruction to both staff and line... and customer in some combination. Such a pro-active program would be the more effective because it is compatible with the key trends:

First, increasingly complex products and services are demanding increasingly complex training and communications responses to the firmly established legal and competitive pressures. Some products cannot or should not be used by the purchaser without prior instruction, whether because of danger or intricacy of procedures.

As a result, today's marketing executive is confronted with issues and obligations that did not exist two decades ago. Some marketing executives already see that as a new opportunity; others will need your assistance. Post-sales assistance is competitive dynamite! Helping you to assess and <u>meet</u> those new obligations and opportunities is the purpose of this book.

The second trend is the shift of great segments of the labor force into a status of <u>inadequately skilled</u> as the general economy shifts to skilled labor, high technology products, and increasingly complex services, even those designed for the general consumer. No one will knowingly buy a product he can't use. Teaching him how to use it is your obligation.

Consider that a skilled and valued secretary can become an incompetent word-processor operator with the purchase of a common and now inexpensive instrument for the desktop. Also, current unskilled labor from smokestack industries might remain permanently unemployable without retraining into some new field.

Some displaced labor probably will come to your company seeking employment, and you might not be able to prescribe prerequisite entry skills that can be met uniformly without a training guide. Therefore, training will become a community

service response as much as a company burden. People in the greater community will benefit. Is that bad? Clearly the need to instruct at all levels of the company's internal workforce, its marketing chain or distribution network, and its intended, or target, consumers has become nearly inescapable. The need is for you to learn how.

The third trend is the quiet growth of an underclass that cannot read or comprehend complex information or instructions at all. While this problem cannot be blamed on business, what kind of company wouldn't care? Big business today runs private schools, some in conjunction with public high schools, colleges, and universities. No doubt there will be even more schools involved in the future.

These faceless, nameless populations of sometime-illiterates constitutes an immense market, given the Federal government's estimates that one in five adults nationally is language handicapped, reflecting either a lamentable level of high school reading skills or a major segment of the foreign-born population who are normally illiterate in one language—theirs—or both...or anyhow marginally literate in English. We published a book (*Practical Word Power*) that was self help for tutors of middle-competency learners of English, whom the government abandons to their own devices at fifth-grade-completed. PWP teaches standard pronunciation via dictionary to marginally competent speakers of English. That seems to be called *accent reduction* these days, although the English comprehension level is higher than simple pronunciation. Strangely, teachers and language schools seem to resent such a simplification, which apparently threatens their jobs by making their jobs seem less complicated.

If you need convincing, think about the city of Flint, Michigan, which was ravaged with the closing of a General Motors plant in the 70s/80s era of "not my responsibility" among big business. There and then, business and labor unions combined to reject improved techniques developed by the workers. Ostrich-like reactions don't seem to work anywhere

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else, either. It'll take knowhow to preserve the current economic system.

Fourteen or twenty percent of the general population is an enormous consumer force; it can misuse your product or misunderstand your service through a cause far more serious than carelessness: their ignorance of printed usage safety recommendations and measures to be taken. Would you care if persons are injured while using your product properly? Legally only, or is there a humane component to concern?

Finally, lest the numbers escape you, keep in mind that the unemployment rate during the Great Depression was only twenty percent—the same number! Does that give you a new perspective on the potential problem? The Great Depression was ended finally by World War II. Do we need a repeat before recognizing the value of training?

Fault aside, if the end user does not understand how to get the optimum results from your product/service, the product/service itself is invariably blamed. That's human nature. It also is a primary cause of lawsuits. Negative word-of-mouth hurts. Fair criticism or not, the direct actions, attitudes, and even the warranty problems created by any uncomprehending end users can cost your company money and headaches. Any widespread lack of user comprehension can destroy the reputation of even a good product.

Should business maintain a stance of non-involvement? Is the short-term benefit of stockholders worth the agony of a nation—possibly its destruction? Without a nation, will there be big business? Where does responsibility begin and end? Before he was the Secretary of Labor, we heard Robert Reich tell a meeting room full of philosophers in Chicago that he suspected conflict of interest for that profession's silence on labor issues. Are their personal grants at risk if they criticize big business? The assembled professors congratulated him—even if the truth hurts. Reich has also written that "The conservative vision of a market economy in which people are driven solely by greed and

fear is crippling the US economy." That in the early 80's. Isn't it time for that concept to be sinking in?

In late November, 99, the president of the Teamsters Union attacked the World Trade Organization for putting "corporate greed, corporate profits above human rights." His stance was seconded by the AFL-CIO President. Seattle was their battle ground, taken up by the young and aware. Quebec?

Clearly, there is a broadening awareness of a contrary but pervasive view. It might be called humanistic, although that term has been sullied by religious connotations. Everything is not seen across the entire population of the globe in exactly the same way as business in general chooses to describe it, even if the public press relies heavily on government pronouncements. If you can tap into the dissatisfactions that exist just under the newspaper-sanctioned surface, you can perform worthwhile actions (or even those perceived to be worthwhile) at relatively low cost with high visibility.

Loudly refusing to buy from foreign sweat shop operators is one such populist action that is virtually free if not obviated by greed for excess profits. If the policy is loudly announced, your competition will have to match the action (and purchase price) or face public discredit. Such humanistic action doesn't even require an investment of time or money in programming.

The massive retraining needs of the general labor force and the marginally literate general population must be addressed by government. But, as we have seen, the company is not immune to negatives; so it will responsibly and wisely address the issues directly: with instruction!

That instruction can take the form of either education (the teaching of theory and general principles so as to meet the unforeseeable future problems) or training (the application of only those selected principles, practices, and units of information relative to the given problem at hand). The instruction can be offered within the company, down its marketing chain, or throughout the communities contiguous to major offices and plants. It might even be sold to the general public, as with

computer training. Was any industry ever so ready with the necessary? Even the scammers are already at work.

This is not to say that you should approach the general public with training even if you manufacture consumer goods, although a serious discussion within the company can't hurt. However it does suggest that if your product could better be sold by educating the public or other end user, then you should consider training all those who represent you in between.

Most firms will claim they've been doing that for years. Some have. Maybe a few others have, too. More likely, they have attempted something resembling a training concept but have fallen short with a simple brochure or print or visual instruction books and tapes that needed more explanation than they offered. Presenting cogent information and techniques to your salespersons, your sales reps and agents, and your prospects and customers is a job often left to advertising or sales promotion writers, who might or might not fully understand either the information and its function or the end user and his needs and problems. Moreover, as the product evolves from being a barrel of loose parts through assembly to packing, the training task changes, too—technical trainers and training managers know this. At least, they should. However, as the same product passes through the distribution or marketing chain, the marketing problem and thrusts also change. Competent marketing executives are aware of this, too.

Regrettably the common response is to ignore those interim changes and attempt to pull the product through the distribution chain with advertising. The result is that no one ever deals with the problems that develop in the chain until they have manifested themselves as critical. Too late.

And that's why so many sales managers find themselves stomping out brush fires instead of overseeing the planned (and, on paper, beautiful) sales program: the salesman is the only human contact many customers have with your firm; and nearly all the complaints are addressed to him with vigor and venom. So why not train that salesman to deal with complaints?

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Some firms do attempt to deal with that phenomenon by teaching the salesmen how to placate the irate customers. That's a stop-gap measure—why should there be irate customers? Listen to customers! Unless it's the prelude to dealing with the complaint itself, anti-venom training could be only a band-aid on a puncture wound that could prove fatal with that account or even with that product.

Notice that, strictly speaking, "How to Deal with Customer Complaints" could itself be a training item which should select relevant techniques from the spectrum of educational theory in the human relations and psychology of anger and hostility But why waste the effort on a go-nowhere project? If you see the difference here, it's not likely to cause you any particular difficulty; we'll discuss it further in Chapter 7.

If you honor all complaints as Distant Early Warning signs, you will have a fast fix on potential problem areas that might both require and respond to training-type solutions. This does not mean that the salespersons should or must be the program-delivery source, even if they first carried the complaint. Gathering and evaluating complaints to establish validity, relationships, and priorities is an umbrella effort which will guide both the general effort and the specific answering program later developed. Helping you to appreciate and develop that umbrella (or master syllabus) outline is a purpose of this book. When you understand the principles, key methods, and cherished biases of the training field, you will be prepared to make the training potential serve your managing and marketing objectives.

Before any training program can do its best work for you, you must ascertain that your particular program and methods are fully responsive to your needs and valid in their measures. In other words, you shouldn't be hauling dirt in a Cadillac or trying to pull a railroad boxcar with a motorbike.

To develop a feel for the type of horsepower you require to do each of the information/training jobs you identify, you should understand the overall job process well enough so that experts called in to prepare various of its parts (such as content

specialists, media specialists, platform trainers, and instruction systems designers) don't knowingly or unknowingly distort your perceptions, judgments, or purposes. In theory, your own Training Department (with its many specialists, if you have department and specialists) can help you. So can competent consultants. Your accurate measure of them might help most. Reality still requires a check.

An especially interesting book in relation to understanding instruction is *Practical Approaches to Individualizing Instruction*, by Rita Dunn and Kenneth Dunn. It appeared in 1972. By today's standards, the methods can be considered rudimentary; yet, by the standards of that day, they were quite advanced. Much the same criticism is applied today in the rush to denigrate ISD, or Instructional Systems Development. But there's a major difference. Whereas the Dunns presented ideas and methods that were later recognized as advances, the critics of ISD cannot point to improvements of any kind via their criticisms. Neither can they claim that anything available is superior, even though ISD might not be perfect. Why?

Throughout your search for the proper content and mechanisms for delivering your message, keep three main things in mind: 1) ISD is not the only approach available to you—it is merely the surest method for assuring that complex projects will work as intended; 2) anything that works (no matter how simple) can be standardized as an alternative to ISD, however you arrive at the solution; only standardizing assures consistency over time and numerous applications/trainees; and 3) prospective suppliers of programming don't like the fact that ISD can be considered a do-it-yourself method for prospective clients; suppliers have a vested interest in denigrating ISD before you use it to exclude them.

The task of determining or recognizing the complexity of your needs is yours. Some programs are more complex than first anticipated, and some are less so. Many projects in life end with the statement "If only I had known..." That's why some people hire consultants. But if you haven't first learned the rudiments of

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training, you'll be at the consultant's mercy in a field that can't be accused of being forthright or "professional" in the sense of intelligent standards met and enforced.

Face up to the situation that confronts you: a) do-able jobs/tasks that somebody knows well, or b) new responses to new problems regarding which nobody has expertise. Then you won't be surprised that this author has chosen to discuss in detail only the latter, ISD. This is not to say that the former do not matter—only that if someone knows, then begin by committing that knowledge to paper. Roman Numeral outlines work wonderfully well to organize the topic. A Roman Numeral outline is in fact known as a Master Syllabus in ISD terms. You needn't be an expert in outlining—computers automatically assist you these days if you know what you want to include in the content. If you have no idea, why are you in charge?

But there are other considerations. If training solutions to company marketing or production problems are possible now, and if they have never before been suggested, then the viewpoints of Training Department personnel could be faulty or inadequate—not their fault, and not the most reassuring starting point for a major undertaking. Who but you should determine?

Not all inadequacies reflect individual faults—some seem built into the training discipline by increasing specialization: perspective is lost. With training and trainer-training now a full-fledged wing of adult education, commercial courses are common. Some are taught by doctors of education, and others, by doctors of snake oil. Some contribute to the field; others borrow and run. If professionalism is the goal, argot and sophistry are its byproducts.

One negative result is that some practitioners of the training arts have become so embroiled in the arbitration of disputes between *pedagogists* (teacher-driven) formats and *andragogists* (learner-driven) formats...or between instructor delivered, computer-assisted, or self-help formats...that they sometimes overlook corporate purpose. Think: should you be teaching by direction, or should your trainees be asking? If someone wants to

study brain surgery, the medical school's question is NOT, "What would you like to learn?" Among college students, the choice of field is theirs. Which situation is yours?

In such cases, a sometimes outstanding array of book learning is lost in a practical incompetence—education, but no common sense. Unfortunately, that is also a common symptom of "training" courses that depend too heavily on lectern theory to effect changes in performance that only practice can hone and prove.

Another negative result is that training as such has become big business. When major organizations commit tens of thousands of dollars to the development of a program design and tens or even hundreds of thousands more to the implementation of the recommended program, the opportunities for the quick-buck artists abound. Unfortunately, the industry organizations don't identify the offenders or types of problems, and you are left to trust and hope.

Although there are countless qualified and dedicated people and purveyors offering services, there are also marginal and outright fraudulent offerings, too. Generally, the hucksters depend on the somewhat technical vocabulary of the training discipline to impress and confuse you—to provide *face credibility* for them; that is, the illusion of knowledge not based in fact. If you are uncertain, you are considered fair game. A good defense: learn ISD!

In the last analysis, training practice is essentially the codification of the same (or similar) practical means of transmitting knowhow from the skilled to the hopeful that has been used for thousands of years: the replication of those specific actions (or behaviors) being sought so as to eliminate trial-and-error (except when that itself is occasionally instructive). Photo images can replace tools or teachers if properly used. Emphasis on the *properly,* please. Our understanding of the human psyche and animal self (we hope) has improved. Don't give all the credit to visuals. To accomplish, the trainer (or any involved executive or manager) must *understand* the task to be

transmitted. It must be pared to its essentials, and the motor skills—when those are part of the task—must be practiced, normally under direct supervision. In sports, that's usually called *coaching*. Dollar costs are often low when human concern is high.

Finally, it is chic these days to say your firm is out-sourcing its unusual needs. Often that includes training. But if no one understands the program, how can you tell the out-sourcer(er) what to construct? Or how can you deal with the products you receive ultimately? And if you buy *generic*, for editing, how can you edit if you don't know what you need?

While radical changes could be necessary in your firm, that's not the norm. Even programs that have grown by accident over the years probably have valid and usable elements; and therefore much can often be accomplished with a redirection of effort to fine-tune existing materials. New uses for old stuff might be found with judicious editing. Rarely (but sometimes—you decide) need all old stuff be thrown away. Therefore, before you hire professional "heavyweights" (at potentially great expense) to re-evaluate and revamp your entire program, you'd be wise to do some preliminary rethinking yourself. This book will help you—just follow the sense of the forms provided.

After all, no one in the Training Department is privvy to the exclusive marketing facts and unannounced strategies being discussed quietly in closed executive sessions. No outsider can be handed competitive or otherwise sensitive data before being proved out. And no one in the organization can bring your understanding of past history and current perceptions of the market to the process better than you. Therefore your understanding constitutes valuable input.

Some custom programs cost a lot of money; some are simply overpriced. Some programs will need to be tailor made; some can lean on generic formats that are on the market—at one-third cost plus personalizing expense. Expenses can be enormous—ask! Your precise needs will determine your response. No matter how deep a role you play in the ISD process, you must be able to

describe your own ideas and perceptions to the project's administrator. You must understand the concept and the technical explanations that come back to you. In short you must be able to communicate with the programs' several developer/specialists...and maintain perspective based on your objectives in the barrage of suggestions and options and pointless blandishments that will come your way. Training is a very human function, subject to human foibles. ISD's intrinsic structure eliminates foibles.

The focus of training is the performance of people...and people are the focus of your business, no matter what you sell. You sell *to* them and *through* them and *because* of them. When they comprehend purposes, they usually cooperate and fulfill. When they understand, they use rather than abuse. When they believe in your product or service, they buy—repeatedly. When they appreciate and are appreciated, they grow in stature and master applications and skills critical to your success. There is no legitimate business venture that does not involve people.

People are responsive. If you make an honest effort to reach them on their own levels of capability and interests, they will meet you half way and, research on the Hawthorne Project has demonstrated, even lend you a helping hand. So encourage and reward; never manipulate! Competent training reaches people by addressing their needs, both human and job related. Treading in the personal area is dangerous although occasionally successful.

If you construct training sessions (whether using the training title or a clever disguise) that appeal to the human motivation to grow and improve, you will perform a service whose favor will be returned many times over.

The need is there. The opportunities are there. And only your own sense of direction and commitment are needed to make common sense and human nature work more efficiently and profitably for you. Managing (and marketing) Through Training could become one of the best business deals your company has ever made!

Settling In:

Regardless of how or how broadly it's offered, increasingly instruction must be offered. No one can walk away from the needs with impunity. Neither can such broad needs be addressed only casually. *Good communications* was one valid answer of the past. But if we accept the definition of communication as *comprehension signaled by an appropriate response*, we cannot communicate with the language handicapped because they can neither comprehend nor formulate a response. Ergo, no response; no communication.

There will always be an educated and alert group with whom you can communicate simply by providing a clear and concise unit of information. But grand articulation is rare. Moreover, as a truism of the training field cautions, *telling is not training.*

Some statistics might help. Business is in fact spending more money these years, after a dull period, according to reports published by Training Magazine However, since the number of employees has risen, per capita spending has not been raised appreciably. Yet, when we look more closely at the numbers, we see that off-the-shelf (or "library") materials get more money than either outside services or custom materials. Budgets for 1999 are up perhaps 25% over 1994, up less for trainer salaries—but the big jumps are in outsiders, for seminars, hardware, and outside expenditures. Poor little old "custom materials!" Who's really starting from scratch these days? Is it all patchwork?

Either businesses are not as different from each other as they have often claimed, or people are taking the short-cut to training via off-the-shelf packages. Who's adapting them? Given that the number of members in the American Society of Training and Development (ASTD) professional trainers (admittedly not the whole training universe) is a fraction of the number of prospective companies, it's likely that unqualified people are in charge in too many places. That's probably even more true in the

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mid- and small-sized companies, which often can't compete with the giants for trainer salaries.

So the type and depth of instruction that might be made necessary in your company's response to the actions and interactions of the three stated trends will go beyond basic communication. It might require repetition and physical practice conducted under the direct supervision of company employees or in schools or training centers supported in part or in whole by company programs and company funds.

And that depends in part on whether you have 2, 20, 200, 2,000, or 200,000 employees.

In most instances, the company will probably try to limit its activities to those directly involved with the job or product. Some will take the opportunity to contribute to the community and society as part of the *corporate responsibility* or *professional responsibility* movement. The particular company motivation is perhaps irrelevant once a determination to instruct has been made and implemented. Validity and effectiveness become the focal points. The essence of effective training, especially by the methodology known as Instructional Systems Development (ISD), is *the strict derivation of new learning from the job itself.* With consumers, the "job" is simply the proper use of the product or service to meet their individual needs. Unless you (and all managers) accept the requirement of proper job performance itself as the performance criteria against which to train, your well-intentioned and even grandly budgeted programs in state-of-the-art formats can go astray. Money is not the determining factor. We'll explore this concept in Chapter 4.

Until managers understand the underlying concepts of training, their plans and expectations can fail because of either the normal slippage that occurs in relaying ideas or in the inability of in-house training staff to respond to new needs. The latter could result from any combination of factors, including current overwork, inadequate budget, unfamiliarity with the real-world of marketing, psychological commitment to the status quo, personal biases for or against the given target audience or

processes...and—surprisingly—incompetence in the design and development of totally new programs.

This last failing is often hidden under other labels. Rarely is it recognized, much less acknowledged in the press. Lasting damage can result. Any training director who understands the real world of marketing is an asset to any marketing or other manager as well as to the company IF he is competent in training theory and practical programming. But many hold the position directly following isolated successes in other areas (such as field sales) and have personal abilities but no pertinent skills to contribute as trainers. So they cannot create lasting programs.

Consequently they can't convert "inside" understandings to practice, except by costly experimentation. Consider that some commercial seminars for trainers try to help trainers "sell" the training-instruction function to management. Training needs to sell itself only to the extent that it has failed to demonstrate its past or current contribution to the revenue-producing functions of the organization. For as long as trainers are content to be looked upon as programmable servants rather than original thinkers, they will be viewed as cost centers rather than as potential profit (or cost-saving) centers. And unless and until you make a demonstrable contribution to a revenue-producing function, you are perhaps wasting your energy by pleading an emotional case. ISD can even help you to assemble pertinent facts.

There's little reason that training should not become—in an era of its expanding importance—a co-equal management function. The VP/Training slot should be common, not remarkable. And the relationship of market-oriented training to advanced marketing techniques should be established by example, whether the training director reports to, or confers with, the marketing director. Even sales training—unarguably a marketing function—has often reported to the factory line people (who "understand" only the equipment) or to the human resources/industrial relations staffs (who "know people"). The

historical framework of training must be changed from second-class status, or else training's future status cannot be.

Because of both the cost and the time lag inherent in developing major new programs, training has dealt with the past, people continue to be trained to do jobs as those jobs existed at that long-gone time in which training was first given. But we are now in a time when we are confronted with change and the new. This is a time to be pro-active!

Even under the best of circumstances, when jobs change, trainers sometimes aren't told until a problem appears. Because of the time lag needed for programming corrections, training can appear to be unresponsive whether or not it actually is in that particular company or instance.

Reporting to the Personnel Department doesn't help matters. Personnel functions, whatever the title, usually deal with the traditional job or with the type of individual that the supervisors traditionally suspect will be right for a newly-created position. Few supervisors or trainers are prepared to deal accurately with the *current* market or *current* perceptions, much less with *future* aspects; that, in turn, reflects a general lack of appreciation for the *derivative* nature of training developed and validated under the dictates of ISD procedures. Doing something seems to take precedence over doing what's needed. And many harried trainers don't have time to determine what's *needed* because they're too busy doing what they've been told to do. So historically...(complete the thought as you choose).

Yes, staking out new territories involves new risks. But is it possible to progress and play it safe simultaneously? Your minimum obligation to yourself, therefore, is to develop at least that degree of competence in ISD that will enable you to suggest with confidence the development of the marketing-oriented programs that can lift you and training out of the servant class...and to buy or otherwise design and deliver those programs once they're accepted if the task falls to you. One learning adventure serves both ends.

This book is designed to give you (and all the managers you'll be dealing with) all the understanding of theoretical background and practical methodology needed to a) assess your needs, b) estimate the personnel requirements, c) estimate the costs, and d) actually initiate plans to design or enhance a simple (or complex) training program or supervise the creation of even the most complex training program. Have confidence!

In short, this book will guide you to design and later oversee (if necessary) the training functions contained within those broad programs. That new skill will allow you to capitalize on your (among those identified) marketing opportunities.

Everything you will require in order to create or supervise the development of those new training-related programs—alone or in tandem with other line or staff or marketing and training executives—is contained in the ISD methods of the new companion book, *Common Sense ISD*. It would be normal to feel a little uncomfortable early in your new role, but the role will come to feel proper as you see the methods of this book at work for you. If you meet objections based primarily on traditional roles and lines of authority, you might try to assess the degree to which such (faulty) attitudes are contributing to training's shortfall in the corporate hierarchy. Then you might try to change things. Be prepared for a fight. Top management has traditionally never welcomed change, no matter how necessary. It has been, in fact and on occasion, downright reactionary! Even that is changing.

Take the good ideas wherever they occur. Talk to the people who do the job. The realization that good ideas can come from the bottom and go up the ladder is very new in American management, but it's valid. Participative management is relatively new here, too, and in an embarrassingly common number of cases, it's an improvement over tradition. The Europeans were far ahead of the US in this.

Even though you might not be in the field daily, someone is, and you still have contact with many of the field salespersons and sales managers who are. They have input-ideas, and you can

become a conduit for new ideas about improvements and alternatives never before committed to writing. Make it easy for the information to come to you; you'll never regret it!

Because you will understand the potential of an instructional program, you will have an advantage over the marketing executive who does not. To succeed in bringing a training awareness to top management, you will become the coordinator of valid ideas and potential responses.

That's not a small commitment, but this book shows how your training knowhow can convert into functioning projects and programs. Yet ISD shows how to achieve those ends by competent methods. The overdue answer is ISD! If your company has been stymied in its market penetration because of your or the company's shortfall in the conversion of knowledge to practical knowhow, you will now be freed. If you have been frustrated in reaching your end-user because of a deficiency of understanding of performance skills anywhere in your distribution network or overall marketing chain, that frustration can now be supplanted by direct action. And if you have been stonewalled in your attempt to introduce needed training-related programs because the existing training department is short-handed, short-funded, or even unsure it can develop a new program from scratch, you're about to penetrate the barrier. Congratulations, even if the feeling is scarey. The tool with which you can accomplish that transition is ISD—Instructional Systems Development. ISD is a system! ISD is the world's most highly-structured system for assuring the relevancy of training to the job needs. As developed by the military, ISD is solidly grounded in related educational principles and systems. It will work for you.

This book refines, simplifies, and interprets the military's various procedures in the recognition that most marketing uses will be less complex than are military technical systems, and that your program count will never approach the tens of thousands of courses which the military must code, catalog, and track across countless installations.

Then we go a step farther: To whatever the military has offered, we add the insight and meetings knowhow which have made our previous books standards in their field. The result should be what we hope and believe to be the most comprehensive, useful, and dependable ISD book in all trainingdom!

We've also adjust for the shift in emphasis between the military's direct order to perform (with its authority to remediate or discipline) and the company's general position of voluntary compliance, especially down the marketing chain. Yet all the significant control features of the military version of ISD have been preserved, here enhanced with original rationales and linkages which do not exist in the various military versions.

In the process we have created a totally "new" ISD system especially for the company: for the line, staff, and market-oriented training of the future—a first. And while our system's examples are couched in marketing terms, its principles and methodology are applicable to any training program of any complexity for any training purpose! Have confidence.

Some of the media evaluation procedures intrinsic to ISD for the selection of instructional delivery systems will serve equally well for the selection of the proper media for the (visualized) presentation of meeting information when a full-fledged instructional program is not required or justified. Some of the ISD procedures related to the identification of specific job tasks and specific task performance measures will improve the company's ability not only to hire for existing jobs undergoing change, but also to target prerequisite and post-hire needs for future positions. That could eliminate trial-and-error hiring, even when (because of identified prerequisites) further training would not be required.

For all those reasons—and for whatever additional reasons you can bring to this reading—we believe this book can change the way both trainers and managers view training. As you will come to believe, training does have something new and valuable to offer to marketing and profitability. No repackaged leftovers!

No fad theories that deal in *format* rather than *content.* Just solid ideas that ISD can help you guarantee will succeed...demonstrably.

When the new viewpoint opens up new assignment horizons—as it surely will—the practical expertise you will need is here. Everything an outside source can bring you is provided or envisioned (with action plans and alternatives) here in these pages. You can be throughly prepared for all possibilities. You must bring your own experience, and your own training experience, if you have any. Add to that the many market-related opinions and ideas expressed by competent sales managers and their salesmen. Add your own fresh ideas from your observations and ruminations plus a commitment to honor the established ISD principles and methodology. You need a willingness to tackle projects and achieve objectives you would never before have considered.

As you learn how to create or supervise valid training programs for marketing purposes, you will be educating yourself in a valuable new skill which will serve you for the rest of your business career. There's nothing wrong with becoming known as an idea person whose ideas really work.

As the saying goes, *The race is to the swift.* The starter's gun has already sounded. Are you already in the running, or are you still looking for a starting line?

ISD! Remember it. It will remember you.

Chapter 2

Problems as Opportunities

Suppose your company acknowledges an existing training need or suspects that the solutions to a recognized problem presents a competitive PR advantage. Or quite likely, you have never before considered the opportunities presented to the firm by contribution to the bottom line made by the solution to some of the problems confronting the society as a whole.

In theory, your opportunity is almost limitless, but that's not a very helpful statement. In fact, that view is hurtful if it encourages you to buy into improper evaluations and useless components. Scams abound in the world of "charity," too. Some of them involve "training." On a practical basis, options in any given circumstances are relatively easy to assess once the needs are clearly (or essentially) understood and defined. That's especially true of the Instructional Systems Development (ISD) process on which this book is founded, because the types of training-delivery systems (including trainers and media) *most appropriate* to various needs are identified by precise algorithms. That is how how-to material is provided in full in ISD.

Mechanics are only the second step. The first—and indispensable—step is your understanding. Without that, nothing can hope to succeed. Any attempts without a clear understanding by you (or someone) will be merely a crap shoot. Some might succeed—but you can count on nothing in advance of trial. Only rarely will be needs be fully defined and unequivocal in advance of the needs analysis.

Usually, you will be faced with recurring problems not easily linked together or to your product/service, especially if the answering course is subtle. There will be complaints that can be ignored or handled, as you choose. Ignoring problems usually begets new problems. If you accept complaints as Distant Early

Warnings, and if you properly evaluate them, they might prevent major problems later. Respond to human need. Therefore many competitive and program skills are only tools to be applauded as only *common sense* in ISD practice.

Knowing that the skills of programming can be mastered regardless of your own background, you might find perspective on the training world to be helpful, too. It will assure you that you are not alone in the training quandry. Neither are many people holding a trainer title; but they are obligated to bluff, and you are not.

If you've made any preliminary inquiries, you've probably heard some of the astounding statistics reported in 1985 by the Carnegie Foundation for the Advance of Teaching:

> ➤ American business now conducts about 12-million in-house courses at a cost of about $40-billion annually. That's nearly two-thirds of annual budget of all colleges and universities. And the figure was developed about a dozen years ago!
> ➤ Nearly 8-million people were currently being educated or trained (that is, instructed) under corporate auspices, seen as a major force in continuing adult education. This number is approaching the total enrollment in four year colleges and universities.
> ➤ Courses ranged from advanced physics to remedial math and English, apart from product/service training itself.
> ➤ Advanced technology has found in the past that business is more responsive to change (feature that!) than are college courses because of the long (2-3 year) lead time for changes to be made in a college curriculum at many institutions. But even that's changing.
> ➤ In 1985 (only two decades ago, as we wrote earlier), Motorola spent over three percent of its payroll on training. That was considered to be triple the U.S. average. Historically, when we entered the training field

in the mid-Sixties, trainers were exhorting business to spend two percent of a man's pay annually. Many considered that to be blue-sky. And we're not there yet. Clearly, business pays abundant lip service to training but little money, nonetheless. For current statistics, see *Training* Magazine's reports annually.

In addition to the traditional in-house programs, some major corporations have created accredited colleges and trade schools. Some of these facilities have been spun off as public, degree-granting institutions; others, such as Bell & Howell's DeVry Institute are now maintained as for-profit ventures.

Investment in special training facilities ranges from zero in the majority of smaller firms to four technical institutes of IBM consolidated in Thornwood, NY, over 2 decades ago. Their annual training/education budget now exceeds $700-million. Is that Philanthropy or necessity? Meanwhile, it's on their Annual Reports.

AT&T, General Electric, General Motors, and Zerox are among the giants whose annual training budgets are also expressed in multi-millions of dollars. Hewlett-Packard's communications satellite system present its classes nationwide, designed by M.I.T. And telecommunications also connects Stanford University to more than 100 corporate classrooms.

We are not arguing that you should necessarily begin a major program of any kind. We are suggesting that your view at the moment might be narrower than wise. Responsiveness to change is one of the prime virtues of these forward organizations; it appears to be an absolute necessity in these days of high-tech; and it can be yours, too.

But the growing alliance between business and public educational institutions is perhaps best expressed in the creation in 1984 of the National Technological University headquarters at Fort Collins, CO. Sixteen universities jointly created videotaped courses in advanced technology that were used in formal engineering classes sponsored by seven corporations. These

degree courses are the video-age counterpart to the correspondence courses of the past. Such joint ventures are likely to continue, especially because corporations and schools can share the same state-of-the-art time frames in the future.

The danger in this process is that corporate technology might ultimately come to drive the nation's education system. That, clearly, would reduce universities to the status of advanced trade schools. While that might be immensely practical and popular with companies and users, it will surely distort the nation's education, which cannot sacrifice for corporate gain the depth and breadth of the philosophy and skills required to minister to the human needs of society.

Philosophical differences in focus and purpose between education and training are of critical importance in this context; and the topic will be discussed at length in Chapters 4, 5, 6, and 7.

But the practical aspects of the relationship are even more telling. Even though a few dozen high tech corporations are among the major employers of the nation, the smaller firms employ the majority of all workers. For the needs of the few giants to dominate and determine *national* response should be intolerable.

The United States Statistical Abstract for 1970 lets the numbers speak: 32,000 firms employed over 250 persons each; 71,000 firms employed between 100 and 249 persons; and 518,000 more firms employ between 20 and 99 persons. Mom and pop operations account for about 1,000,000 units or more. Reagan-era mergers changed the category numbers but not necessarily the individual company count.

Let's assume that the giants have training departments, and a few of the next tier have full training staffs. But who is teaching at the 20-99-employee firms—or the 100-250? Mom and pop need to train more or less daily, but probably none creates a training program first, because *follow me and imitate me* is the original way of the world. Electronic images haven't changed that. Mergers haven't, either.

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Trial and error? How wasteful, ultimately; and how practical given their short-term needs! With merger mania, the number of major firms has changed, but most companies survive intact, even if as parts of a major new parent conglomerate. So reporting pyramids are changing regularly, but the category numbers merely shift.

It's apparent that our youth must be prepared for a life and world of infinite variety; and subsequent specialization for employment purposes must remain the responsibility of the individual and/or his employer...perhaps in the corporate/ university joint venture mode already established.

The ability of corporate money to distort the educational process was established when the Ford Foundation established grants for the first tier universities—which Ford defined as those with Ph.D.s as their department chairmen. The race for fundable Ph.D.s produced a rush and then a glut in which some Ph.D.s now hide the fact of advanced education which over-qualifies them for lesser corporate job slots. Even Ph.D.'s need jobs. If education can become a job handicap, isn't something amiss?

A (Scarey) Example:

Yet it is also true that business should not be expected to bear the burden of remedial education for high school graduates who are functionally illiterate, as some of the immigrant and inner city indigenous populace are. Until the public education system corrects this massive failure, the employer must—for self preservation—undertake remedial and refresher courses for needed skills of employees. Does that mean you?

Moreover, until the Federal and State governments take a more responsible position vis-a-vis the enormous immigrant population dumped onto the job market with only marginal language skills, business probably must carry that burden, too— at least for its own employees. It's inescapable, whether or not desirable. As the hotel industry has discovered, hiring a bilingual supervisor is only a partial solution because guests

often cannot communicate with the the marginal speakers—and often need to. Bilingual supervisors vs. guest lessons? By common sense the bilingual supervisor wins, but it doesn't adequately solve the problem. Language lessons for employees? Apply common sense in your situation, whatever it is.

By the numbers, estimates range as high as 25-million illiterate and another 35-million semi-literate people. Only 4% of all needy language-deficient persons are now reached by all literacy programs combined, according to Jonathan Kozol a few years ago. Official publicity says "under 10%" because that helps to disguise the issue. That's about one-third of the nation's population, for whom plug-in help is (maybe) already available. What is the annual cost of errors and problems attributed to language deficiency?

At least in part, the problem seems to be occurring because various agencies are taking the *most* expensive and *slowest* route to (adult) student mastery: a heavy superstructure of teachers whom agents can teach before the general population is even exposed. Then, how good are those marginal teachers so produced? A better understanding of the training problem (with emphasis on the delivery system) would help to solve the language problem. But greater efficiency might mean fewer dollars in funding. Now, which agency will knowingly buy that? And the public be damned! When will the ethnic groups themselves opt to make English-language learning important? Are we stuck forever with an incompetent, bloated superstructure? Can the never-language-handicapped American teachers actually understand the ethnic-handicapped's problem? Yes, language-learning is on every ethnic needer's priority list— usually at the bottom, for most. Those "thinkers" who compare the US unfavorably to Europe's language-fest ignore the fact that Europe's response is a practical necessary, given its size and history: smaller than the US despite numerous ancestral languages that supported each king's position. Polyglot thinking remains a political tool! Their common market, for instance, is a way to find common ground—which the historical US position

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is now giving away—on behalf of "political correctness." The Flemish, who invented the tongue, now defer to their same language, now known as Dutch, because the Dutch people first codified Flemish. Common ground! We're giving it away.

Look at it this way: If our nation's *combined* college/ university and corporate school enrollment is "only" 20-million persons at present (more than the military population, remember), how can the present formal education structure even *conceivably* deal with the problem of the 60-million functionally illiterate? Nobody wants to admit that the immigrants must take some responsibility for learning the language but how— especially if they don't care? And especially if certain politicians can find their own advantage in remaining middle- men in a language muddle? Many immigrants survive on their native languages in enclaves. Motivation is needed—not handouts. Yes, ethnics can gain political clout, but that doesn't translate into good jobs or language capability for them, advantage for their children, or ready employees for you. It's easy to conclude that the only true beneficiaries of *don't-learn* attitudes are the politicians and advertising agencies that thrive on the apartheit here. Europe is trying to unify!

Those of the marginally literate who were already a problem to their employers are probably among the unemployed...and will probably remain so. If so, who pays? Throughout the illiteracy period or only to end it? How? Can welfare really go away?

So we can establish that about 600,000 employers have a training need to some degree at least occasionally; some, daily. Yet fewer than 40,000 professional trainers belong to the ASTD (American Society for Training and Development) headquartered near Washington, D.C.; and some of these are in companies with multiple trainers or are simply affiliated with industrial or institutional associations, of which there are probably thousands. What are the trainers' "professional" press and associations doing to help end problems?

Unarguably, American business is not prepared for the vast training need that confronts the nation today—in areas not necessarily related to internal affairs. Add that specific need, and the total need is seen as staggering! That total need is exacerbated by the conversion of the economy from smokestack industries to high-tech and other information services.

As a result, most firms that lack training departments turn in desperation first to on-the-job training via incumbent job holders (who might have valid insights, although lacking instructor skills) and then to commercial sources, including general seminars and purchased "library" or custom training modules, often on video cassette. These are sometimes very good as basics, but most must be adapted to your specific needs before use. Who will do that in your firm?

It is quiet fact that an executive (or trainer) must have a workable understanding of training principles before he can adequately edit a "library" program. He will need help. Why else would "library" sources be offering (paid) help via staff editor/trainers? It's probably cheaper and possibly more effective to learn ISD programming! Do your own editing! Properly!

An executive who has no training background—or even a nodding acquaintance with training concepts—is likely to be sold shelf items that will fail him (even if intrinsically sound items) because they might not be *appropriate* answers to his ill-defined needs. The related problem, starring media events substituted for appropriate content, will be discussed again in Chapter 7.

Along with ISD, this book is designed to give you a working grasp of training theory, and ISD does deliver the step-by-step how-to mechanisms you need in order to supervise the creation of a simple or major training program...to do it yourself, if you must. See *Common Sense ISD.*

Where do you stand in the nation's new training maze? And how do you find your way out?

That's easy: ISD. One real-world extended example should help, and it follows.

Chapter 3

The Typewriter/Computer Example

Did the computer makers sit on their hands and wail when it became obvious that old-time secretaries and typists could not handle their new-fangled machines? Of course not. They trained potential new users. At first the computer manufacturers taught everyone—because there were few. Then they taught only the teachers, who then taught. Now the commercial schooling people have moved in with seminars and video tapes and books of all kinds; they're not necessarily related to the manufacturers.

Consider how their training delivery system progressed: from a few people who knew how, to a multiplicity of people who knew how, to effaced narrators (unseen, unknown teachers and tapes and films) who provided the general public's know-how. Settings progressed from the manufacturers' corporate work stations, to your board and conference rooms, to exterior classrooms, to do-it-at-home.

Even so, they had a problem: the people who wrote the training manuals (for example) were so close to computers that they lost sight of the needs of the people using them. We were probably into the 90s before IBM corrected the computer manual of entries regarding Roman Numerals. Earlier, one could find instructions for turning the outlining feature on or off, but it was impossible to learn *from the manual* how to go back later and correct or revise a given outline. Were only perfect people expected always to use their original outlining? How practical was that?

Training is only a response to human need, and ISD is the best system to assure that the response is relevant to the need for the sake of its people...especially if you're considering a do-it-yourself approach. Any company is essentially its people—what they know and can do. The company is not merely its corporate charter or its product inventory. Nor even its public relations

reputation. So what are people worth to you and your firm? In our 1973 book, *Achieving Objectives in Meetings*, we commented on this problem:

"Stockholders will have to adjust to the knowledge that there is no alternate labor supply. Assuming that a given corporation might become inoperable by a foreseeable date, then the total assets of that firm, divided by the estimated number of operable years still remaining, yields an 'annual labor depletion allowance.' How much of that ALDA is the corporation willing to reinvest annually in benefits and employee education and self-realization to extend the profitable life of the firm?"

Where has business been since 1973? Certainly not thinking about long-term prospects to the extent needed. The Reagan-era alienated employees in the name of "down-sizing." Now, employee loyalty is to themselves first. Is alienation a greater benefit than down-sizing? Or overly-short-term, bottom-line thinking? Has your own organization tried to benefit from anti-employee policies? Today, most employees value training as a contribution to their own lifetime employment value. The essence of training, especially by the methodology known commonly as Instructional Systems Development (ISD), is the strict derivation of new learning from the actual needs of the job. Because of its structure, you can do it yourself! In the case of the consumer who is using the computers, the "job" is the proper use of the product or service. Make sense?

Modeling on the Keyboard:

Let's relate some of this theory and general discussion to the secretary's problem in upgrading from typewriter to computer-based word processor or PC. While nearly all typewriters reaching the market carried a now-standard QWERTY keyboard and had virtually identical keys and levers in similar locations, manufacturers aided learning. Later typewriter manufacturers

were able to ignore the entire function of typist-training except for encouraging school classes or (their or independent publishers') how-to books and recommended your testing before hiring. Quick and easy. No training needed (at the manufacturer's office). How the user learned the typing skill was an issue for which the later typewriter manufacturer took no direct responsibility, and in which few took an interest after the machine was installed. Does any employer offer typing lessons today?

However, early manufacturers took the same training responsibilities then as early computer people did more recently. High schools or business schools scheduled typing classes that embodied a key training technique: practice! No one can lecture a beginner into achieving a speed of 60 or more words per minute with accuracy during his/her early attempts. Typing requires much practice. So do most training skills regarding your company's job offers. Guided practice. Abundant practice! Typing is a good example of a wholistic skill (with numerous sub-skills practiced simultaneously) that is not adequately addressed by the sequenced-frames approach of programmed learning, even though that overall learning might take place letter-by-letter. Concept!

The point here is that the post sale consumer assistance via typewriter manufacturers was virtually non-existent while the standard typewriter still reigned.

But when the IBM single-element typewriter reached the market, its mechanical system was so radically different that the company chose to have its field crew instruct each secretary individually: post-sale training had arrived in a previously self-satisfied field. But notice the higher cost and larger product size for a simpler, less-complex machine. That involves marketing, not training.

These days, in most marketing offices, post-sale service and motivation are felt to be essential. Not for tomatoes? No? What are recipes? A good recipe is a great merchandising tool, because a convinced reader will go out and buy the needed ingredients.

But that agreement on function does not carry over to the *placement* of the training function in relation to any other business function. Since user satisfaction reflects on both reputation and future sales to that same customer/company, should the training of the salesperson/installer/cook who will in turn train others (here, trainer-training) be overseen by the Marketing VP or the Human Resources/Industrial Relations VP or the factory's Operations VP? Or the Training VP, where one exists? Admit it or not, internal politics too often make the cut. Doesn't that make you wonder whatever happened to merit?

That question has been intensified for both obvious and subtle reasons with the introduction of computer-based word processing and accounting at the desks of relatively low-level employees. Obviously it is now virtually impossible for any manufacturer to sell hardware without first promising to instruct customer personnel in the post-sale use of hardware and probably software. Therefore extensive documentation has become the norm, both disguised as discussion sessions with experts and as openly tutorial, as on disk. Manufacturers have not objected to their lightened load because some instruction has spilled over into published books, disks, and cassettes now available in any bookstore. We'll return to this idea.

Less obvious an issue is the efficiency-quotient of the given keyboard. The standard QWERTY keyboard is known to produce fatigue because the most-frequently used letters and combinations are not assigned to the strongest fingers. Rumor has it that this difficulty was intentionally introduced because it slowed the typist enough so that the slowness of the early clunker machines was less apparent.

Alternative keyboards exist today—but who wants to fight the penetration of QWERTY? Besides, in training terms, re-learning the new keyboard would require that the old learning first be extinguished—not an easy task, considering similarities. Given these issues, would you (if you were that manufacturer of keyboards) offer one or more keyboard if given the marketing assignment? Which ones—and why? This is the same type of

thinking that needs to be applied to all training situations. Trainees are entitled to know the company's internal rationales (not only the nuts-and-bolts) of choices, products, and ideas that might be criticized out in the field.

When the computer was still a monolithic black box in its own air conditioned clean-room, the computer operator could be taught any keyboard whatever—the time and cost were justified by the tiny personnel commitment and massive importance. But when the personal computer moved onto the desks and into the homes, the matter of which keyboard to use became a strategic marketing decision:

On one hand, it is certain that millions of people who can already use a standard QWERTY typewriter keyboard could not readily switch to a different keyboard without negative repercussions (called "inhibitions") on both instruments. So using a standard QWERTY typewriter keyboard, paying required royalties, and then treating special function keys as an adjunct of the programming routines seemed logical marketing: instant, pre-existing buyer knowhow.

On the other hand, most people who are able to type well enough to use a PC are not necessarily clerk-typists or even secretaries or other day-long users of the typewriter. In the office setting, therefore, the labor-saving features of the ergonomic keyboard could become an important selling feature. But in the home? Don't bother me! As you know, everyone took the easy way out—paying a royalty to the owner of the QWERTY design—as faulty as it might be. But do a retake. Whereas ergonomics (the study of work-energy expended) is not important to home hobbyists, it can become a powerful incentive to the business organization. Will the ergonomic keyboard become "standard" in the future? And will the failure of any manufacturer to offer both types of keyboard now become a future handicap? Marketing. Reflected ultimately in training.

A marketing decision *not* to offer two or more keyboards could hinge on a perceived inability to field an effective training program for the ergonomic keyboard. Yet, given the ISD

methodology envisioned in this book and supplied in *Common Sense ISD* (plus the potential actually delivered by ISD), that *perceived* limitation is real only if *money* is the deciding factor. The knowhow exists in ISD! Increased flexibility in decision making now results. Now take the marketing argument one step further. Since the specific computer functions (and therefore the operator response) will be different with each brand, the ability to offer an initial "sample" lesson to your prospects among company purchasing agents or the general public could be the competitive-plus that binds the prospect to you: people tend to stay with the familiar because it's "safe." Now how much training (even via disk) are you willing to undertake, assuming that you can control it all with ISD?

If you were to market an ergonomic keyboard, would you sell your proprietary course in bookstores to encourage general acceptance? Or would you opt for directly-measurable results via other routes, such as courses for employees of purchaser companies?

Many independent retailers of multiple brands are now positioning themselves as *consultants* to the purchaser. Consultative selling is not new. Quality varies. Yet many of them offer pre-purchase lessons that compare the various brands to the customer's need: buy your choice. But buy! And many customers are choosing to pay out-of-pocket for such lessons for the privilege of making any mistakes in the consulting seller's field office, pre-purchase. That allays purchasing fears nicely.

What does that say about the client's increasing sophistication in relation to the exceedingly complex world of computer products/services? And would you (as a marketing executive for your company's brand of computer) embrace that consulting retailer's training program or distance yourself from it? Would you train the retailer in your facilities or his...or allow him to *dumb* his way to practical competence while supposedly instructing your sales prospects?

What would be your long-term relationship? Would you assign your company's own demonstrator to work at such stores

in metropolitan areas? Free of cost, or at a subsidized figure, or at full cost? Many decisions of the past could be made differently, given the fact of training knowhow. Your obligation is to rethink the past as it applies to the future...if it applies to your future.

And if you decided to train that consulting retailer's own demonstrator staff (called trainer-training), would that event take place in your facility or theirs? Would you provide printed workbooks and preliminary documentation to help assure that each demonstrator (or print boxcar ads) offer full details. Or would you offer one unit to each prospect, hoping that your brand would become *the* comparative standard?

Isn't the latter what computer manufacturers did when they gave computers to the public schools—free? All of this is a legitimate marketing struggle...and it's all training-dependent!

We could go further, evaluating "800" telephone numbers, the related customer service in type and quality, and the training of repair personnel, which also impinges on brand reputation and customer satisfaction. But the point has been made: much of modern marketing cannot be accomplished without substantial amounts of training...whether or not it's called that. Are you willing to lose income, prospects, customers, market position, and/or corporate future just so that everyone now there can continue to keep their heads in the sand? Or would you like to be able take control? And maybe suggest ISD?

Because our keyboard analogies are historical, they are also long known to the computer industry and outsiders. But were they always known in advance of the perception of a problem? If the term user-friendly means anything, it means *problems-first*! Nor is it clear that the various training directors contributed *in advance* to the marketing response by identifying areas of potential problems and outlining potential solutions—to avoid the identified potential problems!

Training needs to polish its image—why not by starting with you?

Chapter 4

Should You Buy Generics?

While the general needs and opportunities of the business community are infinite, the needs of your organization are more likely to be finite and specific. You do not use random numbers from the phone book or imagination to reach specific people. Neither can you use random program modules to reach your specific objectives. Whether a specific program module can help you to reach those needs is something only you (and/or a paid, unbiased consultant) can decide. Library shelf generics might help.

As we have stated,the ISD method will help you to construct a complete program every time—and that program will work. It is guaranteed. But it will take time. On the other hand, a generic program *promises* you instant gratification. But can an outsider's generic program really match your specific needs? Or, if not, by whose labor will it be adjusted and personalized? The upshot is that generic programs are sold with the expectation (and promise) that the program is malleable enough so that you can edit it to needs. Maybe you can. But what virtually every seller of library-type generic programs forgets to say is that you must be relatively skilled in the *training function* before you can edit a generic training program properly. In fact, you need about the same amount of learning either to edit or to write anew. Editing—if you know all the answers—should be faster. But if you do not have answers or do have doubts? Nobody wants to consider those alternatives aloud or in print. That's why so many program attempts fall flat. Occasionally somebody's shelf items might match your objectives relatively closely. If so, use them. If not, learn how to be independent! Learn ISD!

Stated objectives help people to relate to desired performance levels. How can people respond if you cannot

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describe your needs in ways that they can understand and accept?

Your first action step in any training project is ALWAYS to assess your needs so you can establish your objectives and priorities in clear language. All how-to information is provided in basic ISD. for this and other functions. Herein, we present only the theories.

In a narrow, repetitive operation done identically or very similarly by numerous people, either simultaneously (or in series), a single objective might suffice. But in today's business world, the company's functions and needs are diverse and sometimes fragmented. The result is that dozens, hundreds, or even thousands of different training programs would be needed if each function had a formal training plan—as it does in the military. Clearly an unlimited plan could seem prohibitive even if necessary or desirable in general business.

To bypass this bottleneck, many companies previously hired only those persons already fully (or substantially) qualified for the job assigned. Others trained groups in related needs in classroom or laboratory settings and let each scattered group get fine tuning on-the-job.

In general, the larger corporations maintained training staffs and conducted formal training programs; and the smaller firms flew by the seat-of-the-pants. Although neither form guaranteed success, for reasons only recently understood (HumRRO, 1971; and Cavalier, 1983) nevertheless, that dichotomy persevered while the economy had a largely industrial/manufacturing base. But now that more than half the national economy is attributable to services and is still continuing the shift, special knowhow is becoming indispensable at progressively lower levels in the company hierarchy at progressively broader range of companies. The growth of high-tech manufacturing heightens the instructional need, as the computer example of the previous chapter showed.

In other words, if your firm employs more than a dozen or so personnel, you probably have an occasional (and possibly

recurring) training need, no matter how small or infrequent it might be.

If your firm hopes to grow or expand, training will become an increasingly significant need, and the cost of a formal program purchased outside (even if approximately suited) could become prohibitive. They're doing it for profit—can you do it cheaper? Ditto for the division or department head with a major program who can't get the training department's attention or get direct funding as needed, when needed.

If you are a manager at either end of these extremes, or points between, you are a prime candidate for this self-help approach to training programming.

Formal training in areas other than factory skills was uncommon until after World War II; it became a fad in the Sixties as one (lamentable) interpretation of the work of the humanist psychologists, including Maslow, who is credited with conceiving the concept of self-realization or self-actualization, and Frankl, Perlz and Horney, who helped to develop the concept. Many people know the name of Rollo May, a seminal thinker in this line, who did much introspective thinking but never created an easy theory for discussion so people could tap into it. *Ease* seems to be a major part of the story of training's apparent failures. We say *apparent* because there is never proof that *competent training* actually failed (a contradiction in terms) but there are usually adequate indications generally that inputs were defective or wrongly interpreted. For shame.

Soon after humanistic psychologists had had their say, slick merchants were on the street, hawking shiny, gift-wrapped packages with not much content. Fad followed fad: people believed (for hadn't they been told so in ads?) that training has gotta-be programmed learning; or tutoring machines; or sensitivity training, or encounter groups, or T-group training; and/or computer-aided instruction. All of those are merely *formats* that can be used well or badly but guarantee nothing by themselves. *Training don't gotta be nuthin'; training gotta do!*

We first made this observation in our 1973 book, and it's still valid! Worse, it's still necessary to say so explicitly!

For all of these inter-related reasons, professional training got a bad reputation and recovered only slowly (see Chapter 8). The resulting media-madness is still with us.

But a number of things have become clear through research over the past four decades, including these points:

> There is no significant difference in learning when comparing color to back/white (Dr. Joseph Kanner, 1970).

> Entertainment has as its goal present-moment satisfaction. Adult education's goal is present-moment dissatisfaction to promote change (Malcolm Knowles, 1966).

> The brain cannot sustain attention in multiple sensory channels simultaneously; it prioritizes and blocks; attention-splitting reduces learning efficiency (Broadbent, 1958, et al).

> Projected words appeal to the same (left) hemisphere of the brain as does the spoken word without aiding right hemisphere conceptualization (Sperry and Gazzaniga, 1967).

> Complexity and expense of the media have less bearing on learning results than does the skill with which various media are used (Kanner/HumRRO, 1970).

> Motion contributes to expense but not necessarily to learning effectiveness (HumRRO, 1971).

> Step-by-step procedure (i.e. Programmed Learning) does not necessarily aid conceptual learning (HumRRO, 1971).

> Wrong-way/right-way (the cliché how-to) structure degrades performance because some wrong-way learning takes place (HumRRO, 1971).

Chapter 5

Appealing to the Human Side of People

Your objectives must relate to the performance of people. And people are not unthinking, unfeeling machines, controlled by switches, pulleys, and strings. The best interests of employees and management conflict only when one or both have been miscalculated.

For nearly two hundred years—counting from the Industrial Revolution through the Hawthorne Studies begun in 1924—management proceeded on the assumption that workers must be driven to work, and that management's key task was to coerce and otherwise threaten or trick employees into performing to management's dictates. Manipulation was a large part of the bag of tricks belonging to early "motivation specialists."

But a new course was set at Western Electric's Hawthorne plant, in New York, when management began a study of lighting conditions to determine the illumination level under which employees performed best. Elton Mayo was in charge. Employees chosen for the study were not told the nature of the study; yet. Perceiving themselves to be a special group, they began to hold after-hours meetings at which they discussed ways to improve efficiency. They didn't know what management wanted, but they were determined to deliver it. As a result, every time there was a *change* in the level of illumination, whether higher or lower, there was a corresponding new work effort on the part of the study group. Management was baffled when production rose in every instance of change, quite independently of the lighting levels. Then it became apparent that the employee test group was trying to cooperate with the study in the only way they knew how—to work harder.

At that point, Mayo and others realized that the commitment of employees to the organization's goals and good could be demonstrated in fact and in numbers, as well as in perceived

> ➤ Visual and/or oral "roadmapping" enhances the ability of the ear to comprehend even poorly-organized material (Bransford and McCarrell, 1974, 1979).
> ➤ Performance efficiency in sustained tasks involving auditory signals tends to be superior to that in tasks involving visual eye signals (Dember and Warm, 1979).

Obviously some suppliers to the trade are simply lying about the efficacy of their own products and services. It helps to make the point that you should learn about ISD/training concepts before you attempt to buy absolutely anything for training purposes!

Getting Situated:

How does your organization fit into the national picture so far? Your needs are something that only you can determine. You might find portions on-the-shelf from time to time to plug into your overall program. But the salient task for both business and training is to help develop the innate potentialities and current skills of their respective employees in way beneficial to both...and no outsider can have all the answers in a ready-made package!

If you're lucky, your employment candidates will be articulate, will possess the needed basic skills, and will be receptive and responsive to advance training. That is, if you're lucky. But what happens if something is lacking?

You might be forced to provide remedial reading and math before available prospects can be "upgraded" to the point at which basic company jobs and tasks can be taught at all. And this problem is not limited to the language handicaps of the foreign-born. Many high school drop-outs try to enter the job market. Some of the ones who split will be on your doorstep. now think again about everything you've assumed about Marshall McLuhan's dictum, "The medium is the message." How often do your colleagues and loved ones speak media at

you? No one wants to admit that Marshall was already hired by the national broadcast media at the time he made those pronouncements.

Equally clear, under such circumstances, is that media *per se* cannot begin to provide valid answers to corporate problems. Would you understand that after reading the publications of the meetings and training industries, where blue-sky promises and glittering generalities abound? After all, media proponents buy advertising, but problems don't!

All things considered, it's time to admit that the training discipline is deep, knowledgeable, and underrated, even as it's disparaged, regardless of the condition of the individual practitioners. Treading your way between these shoals is your current problem.

Admit, too, that the computer and video can do marvelous things (not all of which you'll need to do), but the multi-media concept is very recent in the history of man, who has survived thousands of years of recorded civilization without them. Yet, unrecorded civilization goes back hundreds of thousands of years in which man learned and progressed. Training is nothing, if not practical. Don't be swayed.

Finally, before letting these considerations run rampant with your imagination, remember the statistics presented in Chapter 1. Now let the imagination go, because the problem is already rampant!

Fortunately, you've found help.

attitudes. That insight has been borne out in the late Fifties and early Sixties by the results of the subsequent inquiries of Abraham Maslow and Frederick Herzberg, who were, respectively, humanist and behaviorist researchers into the sociology of the workplace.

So important is that Maslow study in the development of modern employee relations that the original report is now held safely by Harvard University's Baker library. A fiftieth anniversary reprint was recently issued.

Japanese management—here now known as "Theory Z," in a title by William G. Ouchi, its proponent/author—is essentially the *application* of humanistic psychology previously espoused by American researchers. Why did the American ideas have to go to Japan to be received by management there before here? Can you blame established clichés of management (never before challenged by trainers) for that lapse in the management art of America?

In short, early management's claims that it must act with firm and heavy hand by necessity were disproved...and by gradual steps and experimentation, enlightened managers advanced to the flextime system and participative management in the European style, in which workers first chose their own hours as long as the work got done. Europe was ahead of us, too. Is US management somewhat backward?

There is steady proof of the cooperativeness of the employee when he is fairly treated, witness the late 1900s Chrysler Corporation give backs. Yet those who have loaned hard cash are considered investors; why not those who have invested hard labor at reduced rates? Wasn't the reduction an investment? Was that simply naive? Consider that although Chrysler executives did not receive bonuses at that time, GM and Ford Chairmen took over $1-million each. Nevertheless Chrysler Corporation set aside over $50-million to be shared by 1,436 executives. Give back? To whom? For how long? Then problems.

That brings into focus still another problem in the management arena—that of the conflict of interest between the manager-on-the-make and his enduring organization, whose best interests and employees that manager sometimes abuses in his search for personal advantage and recognition. Remember that the United Airlines' employees changed presidents when the firm went into employee ownership. What amount of abuse was real and what, perceived? Competent training can buffer employees from erratic demands by superiors by attending to need above desire.

Although conflict of interest is commonly noted and even penalized by law, rarely has it been questioned in the actions of individual executives unless they profited directly and obviously by their questionable judgments. Subtle forms still escape detection or criticism, at least. So it was possible for a given executive to bleed cooperation from his subordinates, leaving them exhausted and rebellious while being rewarded himself with bonuses or promotion for having achieved "his" quota. Management has occasionally and in similar ways bled any firm for quick bottom-line profits at the expense of the company's own long term interests. Has business earned an Enron debacle?

Because money amounts are "factual" but motivational and incentive concepts re: employees are (lacking studies) largely imputed, we must turn for unarguable examples to the debacles of the high risk financing of oil stocks by the Penn Square Bank, which took with it the Continental Illinois Bank, in Chicago. The employees who erred appeared to be, in most instances, seeking personal recognition as *wunderkinder*. Had they succeeded (and despite the violations) they might have been lionized; but failing, they damaged the company, innocent depositors, and the tax payers who bailed out the bank.

Lemming mentalities developed from shortsightedness: the demise of steel, electronics products, and railroad industries offer examples. So management as a whole can benefit from the examination of issues that is inherent in proper ISD.

We talk of *management* as if the title itself confers wisdom. Sadly, management has rarely been professional in mid- and lower levels, except in the superficial sense of a similar type of work performed for remuneration.

By that definition, shoeshine boys have a "profession." Relatively few persons are trained to do the new job when promoted. So they deal in guesswork and imitation (or rejection) of old boss' management styles while learning. Secretaries often save their new bosses. Sometimes new bosses don't learn. Should employees suffer?

Rarely has an entire management level been trained together, even when training is offered by the organization. So different individuals in management learn, from disparate sources, random bits and pieces of overall economic and human relations theories. Often none can be proved on paper, good or bad. So the learning goes unchallenged, except by potential disaster.

Although managers can agree on specific economic policy—which can be approached relatively dispassionately—it's far more difficult to remove the personalities from considerations of general labor policy, much less from specific personnel decisions at the departmental level.

In this context, it seems obvious that much management decision-making in the personnel area has been (and, unfortunately, is) capricious, arbitrary, unskilled, and suspect of motive. No wonder company policy and the quality of management are irritating to most employees, as Herzberg has established. We'll return to this idea.

Remember that the thrust of this book is toward general managing (perhaps marketing) purposes, not general internal training, such as assembly lines. Yet, ISD works for all those purposes. So you must extrapolate from the examples given here, which can be approximated in virtually every company. You must project possible methods and solutions onto other groups and individuals in your individual company but beyond your direct control. And you must succeed, because ISD will!

It's easy to see, then, that an enlightened manager who chooses to launch a program that will be used outside his company (whether or not internally, too) could find himself challenging some cherished, if Neolithic, outside attitudes.

It might, in some instances, be necessary to sell your advanced position and ideas in advance of instituting the program. It might, in certain instances, be impossible to convince an outside management to accept your position. But we assume that no formal/produced program will be undertaken for a potential audience of only a few; and so the occasional recalcitrant need not damage either your overall program or your morale.

When you choose to help people improve their own lot in life and/or in their job situations, you cease to deal "merely" with product or economics, which have been the perhaps exclusive interest of management in the past. Instead, you begin now to deal with ethical issues, individual motivations, and even individual and social value structures...yours included.

An Example of Wide Application:

That sounds much more complex or forbidding than it really is. For instance, any organization that assigns or encourages its employees to teach standard English to the foreign born or other language-handicapped groups is operating in the area of social structure.

By teaching English language skills, you (and your company) are implying that broken English and/or exclusion from the mainstream of American life should be considered an undesirable practice that can be solved by language-learning. Ignore the politically-correct contingent. Official bi-lingualism has provoked political problems in every bi- or multi-lingual country *world-wide* along language lines—why bring those problems here? That undesirable conflict is true not only of third-world countries, but also of contemporary first-world nations such as Canada, Switzerland, and Belgium. And this is

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true regardless of whether certain *politicians* will fall or stand on ethnic votes. Political correctness is damaging us. And before the US accedes to all of the demands of all of the hundreds-plus language-speakers already here, it's best we ask whether the types of demands that those ethnics are making here are actually offered in their own countries to the minorities there. In most instances, historic conquest of the indigenous peoples is ignored. Ignorance? Hypocrisy?

And should it matter to non-citizens, the Continental Congress once decided that English—not German—English mono-lingualism—would be the sole official language of this country. Shall we change that history to accommodate ignorance or private political agendas? Ultimately, multi-cultural nations equal homogenized culture: precisely the opposite of what is supposedly sought. Mono-language has been a source of great strength to this country and has made broadcast, newspapers, and TV media possible, not to say that all the outcomes have been marvelous. The national organization *Official English* seems to be only the tip of the language iceberg. Our conclusion: teach English if you must. And don't apologize!

What it all means is that our current problems will be around a while, and you can contribute to a solution. These convictions are expressed as a personal value judgment made from the viewpoint of the employer and the majority, as well as being the creator of a language program for marginal speakers-of-English. More appropriately, language competence and literacy also contribute to the ease of living and therefore to the quality of life of the persons now language handicapped. Proper language can become a major contribution to career opportunity. It's a win/win situation that some politicians would disallow for their own personal and temporary advantage.

Again, our American culture could value that language competence more than does a non-speaker's native culture. Many persons are illiterate in both their native and American languages but hesitate to admit it. But if the sponsoring organization offers (rather than *demands*) a program and if the

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potential trainee has the choice of participating, there is no coercion and no ethical problem created. Don't expect 100% cooperation because some language handicapped persons are waiting for a magic pill. Having studied several other languages, we know it isn't easy! We still mutilate all without favoritism!

You might also have the occasion to attempt to sway the opinions of individuals involved in or targeted by your program. The swaying of public opinion is hardly unknown, of course; but openly attempting to help people abandon their native cultures and to meld with ours could be seen as objectionable to some. Again, as in all workable ethical or morality systems, the greater good should win. The admirability of the intent tends to color the perception of the desirability of outcome when the perceived good is less beneficial than intended—or even negative. Good intentions count. But we can damage even with the best intentions.

When we talk of undesirable actions based on faulty value systems—or when we talk of changing another person's values—we are dealing in the realm of ethics. The Aristotelian definition of ethics is quite direct: *To do the more admirable deed when there is a choice.*

This concept itself provides for difficult choices; and the common phrase "situational ethics" is simply redundant—or often a cover for a greedy, self-serving decision. The Aristotelian model itself provides for differing situations and the conflict of different *goods* (or competing *evils),* although religion-based morality of rules often does not.

Few of us ever face an ethical dilemma worse than that of aged parents or accident-ruined lives. To kill or let live is the dilemma. Ethical dilemmas can occur when neither alternative is admirable or desirable. When a man of little integrity says he "has no choice" but to harm his opponent, he usually means that he will lose advantage or profit; so greed, not ethics, is his problem. Further, a man can act unethically even when fulfilling the non-ethical charter of his organization. No individual and no organization is exempt from the application of an ethical

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code...that realization is at the root of the growing movement in Corporate Responsibility (also called Social or Professional Responsibility, as applicable) these days to avoid pointing fingers at any particular segment of the failed intellectual corpus: Behaviorism, especially.

In an article by Thea Singer, "Can business Still Save the World," in *Inc* Magazine for April, 2001, she argues that the profit motive and corporate responsibility are not mutually exclusive terms—and provides examples of young entrepreneurs who are making it work in tandem.

Now look at the employee. Earlier in this century, when applied psychology was a new discipline still feeling its way, one movement began to view man apart from his values. The sanitized phrase used by the behaviorists, as they chose to be known, is *tissue-based drives.* That means simply the animal-like aspects of man's nature. The behaviorists have set out rather clear ways in which man can be influenced or trained, based on the overt *behavior* that is desired. Some call it *manipulation.*

Conformity, for example, is a highly-valued behavior in our society and in the corporate world. The behaviorists teach that *homeostasis* is the key to the human condition; that is, that man attempts to maintain an agreeable personal state by seeking pleasure and avoiding pain. Punishment and incentives/ rewards are an integral part of the behaviorists' bag of tricks, therefore. And it's no surprise that the fad has worn off among the *cognoscenti.*

Behaviorist principles were first expressed by John B. Watson in his book *Behaviorism,* published in 1924. Watson's prime contemporary exponent has been B.F. Skinner, whose own contribution to the cause has been to denigrate human values and to provide psychological tools by which to coerce and even manipulate man.

One of his creations, of impeccable scientific validity (values aside)—is programmed learning: the learner is led by easy steps and constant minor rewards (usually called reinforcement) toward the desired end. Consistent with existing KITA (kick-in-

the-ash) management theories, behaviorism enjoyed great favor and influence before its decline. There might be some elements of usefulness in Skinner's theories about the parsing of learning steps for sequential tasks, but not for conceptual learning. There is no substitute for common sense! Encounter groups, T-groups, and other ersatz therapeutic approaches to changing individual behavior through concerted effort at company behest likely would not have existed without the behaviorists. That's why learning contracts can't be endorsed by thinkers.

If one pursues the Skinner model to its logical end, then man is only an animal to be fitted into a work harness—no different from the yoked ox, the show horse, or the family drudge. That's an untenable position. Yet it has taken more than a few decades for the value-based theories of the humanist psychologists to make that point. Some of the earliest (early Fifties) theories of Abraham Maslow posited a hierarchy of basic human needs, through which man purportedly moved during his lifetime.

At man's lowest level of development, according to Maslow's hierarchy, were the psychological needs; next, belonging and love; then esteem, including self-respect and prestige; finally self-actualization. "What a man can be, he must be" says Maslow. The last phase, self-actualization, is often marked by dedication to a cause outside one's self. It is sometimes intermittent. This self-actualization is truly *becoming one's self* to a degree that fancy jewelry, dogs, or crazy hats could never achieve.

Although Maslow originally believed that one could pursue happiness directly (leading, through misinterpretation by others, to the Sixties youth slogan, "Do your own thing"—often translated as *freaky*), Frankl convinced Maslow that happiness is a byproduct of fulfillment from other directions, achieved by commitment and dedication. Frankl first posited that one could instill meaning in acts or objects so as to enhance life. That's probably why we all have different values in life. To Frankl, life must have meaning as a precondition to happiness. Much of Maslow's and Frankel's thinking was subsumed into what was

once storming the nation as est training. It was just a fad. Credit was not given to the original thinkers; so truth was never served.

Maslow himself adjusted his theories to indicate that the healthy and growing personality can move back and forth between the esteem and self-actualization phases. These higher levels of development are marked by giving—or *giving back,* as some achievers express it.

Maslow's theories of the value-based (or non-tissue) motives were a direct challenge to the behaviorists. Maslow demonstrated that once people are frustrated on their job, they look for satisfactions in other directions. To both Maslow and Frankl, behaviorism is a demeaning interpretation of what man is. They are not alone in that criticism. Brian D. MacKenzie writes of behaviorism that "both the attempt and the movement were ultimately failures...because it [behaviorism] never managed to produce a significant body of lasting scientific knowlege." And M. Brewster Smith dismisses behaviorism as the *vacuum self.*

The humanist findings were corroborated by the behaviorist work of Dr. Frederick Herzberg. He identified ten motivation/ hygiene (motivation or dissatisfying) factors. Predominantly satisfying (in descending order) are achievement; recognition (trumpeted by the incentives industry); the work itself; responsibility; and advancement.

Predominantly dissatisfying were company policy and administration; the quality of supervision; salary; inter-personal relations, especially with supervisors; and working conditions.

Notice that people seek achievement—so their personal growth is one aspect that you can address with training. That can lead to potential advancement as well as to an increased satisfaction with the work itself.

Simultaneously, if applying Herzberg's findings, you will be helping to neutralize the de-motivating aspects of any company's policy and its managers' marginal management skills. For a broader discussion of both motivation and incentives (plus

humanist psychology), see Cavalier's *Sales Meetings That Work,* especially Chapter 7.

All of that can be done in the context of making a major contribution to the lives of people both inside and outside your company through a program which can be beneficial to the company's image and/or income statement.

One term that has direct application in this area is often ignored because it makes too many people feel uncomfortable: *altruism.*

Cynics say there is no such thing. Those more hospitable to the idea often confuse altruism with *doing good.* One of the best cuts toward cynics is provided by a commonplace example: motherhood. Of course a woman feels pride in her offspring. But does she perform as a caring mother *only* for the pleasure it gives her in feeling motherly? That's especially true in the case of the infant, whose interests most women perceive as identical with the mother-self. The two are inextricable. Baby's and mother's interests are inseparable! That is the true thrust of the word *altruism*: a lack of distinction between other and self.

Altruism is more a concept or a motivation than an action, although it must be expressed in actions. Altruism simply means to treat another individual as self in that circumstance *for lack of distinction.* Philosophically, that derives from either *expansion of ego* to include others or *negation of ego* that normally makes distinctions. In Buddhism, the term is *transcendence of ego.* Because most philosophies are language-based, the differences in meaning can be significant. However, in ethical practice, language is more or less irrelevant, and the actions become much the same in either case.

It is generally thought irrelevant that someone might take pride in a gift or in aiding someone else; it is irrelevant that—if your company truly performs a service with your program—it should garner credit or recognition or even profit. These days, that stance is often known by the common title of *enlightened self-interest,* although that term is often misapplied to self-seeking projects *disguised* as gifts or help.

The implications of the discussion of concepts in this chapter seems to be that the company will always bear the cost, and the trainee will always take benefit. That's likely to remain the main type of program when seen from their first level of effect, because if the trainee does not perceive a personal benefit (such as "free"), he might not cooperate, even if forced to go through the motions.

Yet, an assessment of benefits doesn't stop there. If you can make a program self-sustaining by moving it outside, do so. The company can work beyond the first level toward gains it considers significant, valuable, and substantial. When helping minority groups to gain added skills, for instance, the company is demonstrating that it's both a good place to work and also a responsible community citizen. That's the type of public image which some firms only *claim* with public relations releases...a degree of commitment and credibility that cannot be better demonstrated. What more can a program do?

However valid the legitimate social contribution that brings recognition to the anyone or the company, there will always be ripoff artists working—those who claim to be performing a social good that in fact turns out to be simply exploitation hiding behind a charitable banner. For instance, a Chicago truck rental firm "trained" employees in how to sweep out its returned vans—at state expense—no future value.

Such exploitations include superficially good "covers," such as so-called job-training programs that seem to exist essentially to obtain cheap labor without offering legitimate training; or the political activists who intend to dominate blocs of voters without delivering any significant benefit to those voters. The scams are despicable in ethical terms even if none of them does measurable financial damage to the individuals being cheated. The psychic damage done through the introduction of distrust damages the trusting individual's concept of social responsibility programs, and it injures the human spirit of cooperation.

First and foremost, never forget the people you might release as part of the (perhaps unnecessary) downsizing current today.

That's close to 90,000 jobs per year in mid-decade of the 90s then-currently being lost, even though less than the 2.5-million loss of 1993 alone. The blood bath continues—at the cost of further destroying loyalty. These people must be retrained, either at your facility or—where?

Be honest with people for whom you program. Be honest with yourself. If you are really helping them, your program will succeed and pay dividends. You can bank on it!

Chapter 6

The Era of Responsibility

Good citizenship is coming to American business. Not just talk of social (or corporate or professional or institutional) responsibility that still wrings cries of anguish from the *laissez faire* crowd; that has swelled under the retrogressive policies of so-called supply-side economics. But the evidence is clear: significant change is on the way.

No doubt there are many who envy the lack of reins enjoyed by the robber barons of the turn of the last century, who could use sweat shops and child labor and monopolies and even guns in the pursuit of private gain—and the public be damned! There will be opportunists who put themselves above the public good. There are even defenders of that sad era and attitude who maintain that more was contributed than lost. Ask some of the dead people. The Wall Street insider scandals, including media figures, show there's no bottom to some greeds or their forms. Whatever happened to merit as a determiner?

The real harm done is that some of those who have failed to operate corporations properly might have moved into government and contributed to failures there, as well. The person who helped create the Edsel at Ford Motor Company later helped to promote the Vietnam War. Personality quirks don't disappear with just a political promotion.

What rankles now is the charge that social responsibility is anti-American and poisons the roots of capitalism upon which this nation was founded: that claim sounds convincing, but it's not supported by fact, under which capitalism is an accounting method. Its root is the Latin *captlare*, which means simply *moveable wealth* and is related to our words chattel and cattle, distinct from real estate. The word and concept are not directly related to the Latin word for head (*capitis*), which sounds similar and is given mistakenly as the root in some dictionaries. Also

capitis often is given misguidedly as a justification for letting the money automatically head the organization. Enter the professional money manager! Musical and theatrical talents are likely ending the dominance of *capitis* in the arts. What about business, now?

America had an agrarian economy well into the first half of the Nineteenth Century, which is to say that labor and land were still recognized as the primary producers of wealth. Not until the Civil War and the Railroad Era did finance capitalism emerge...huge sums of venture capital were syndicated for individual projects in hopes of large and quick profit. The Petroleum Age (in which we remain) began in the second half of the Nineteenth Century, and the dollar became sanctified, with bankers purchasing companies they had refused to aid with loans. The employee became simply an interchangeable cog in the corporate machine. That attitude continued until this decade, enhanced by the job-minimizing efforts of the behavioral scientists and other "efficiency experts" of the Nineteen Fifties. Good employees are now recognized as assets.

Now the unions are insisting that wage concessions—or give-backs—be considered a capital investment in the corporation. Employee concessions are at least as valuable, dollar for dollar, as a bank loan, and employees are less demanding of short-sighted bottom-line performance than are outside, disinvolved investors. Some workers are now demanding job security—tying their entire future to the company's welfare. They want the company to perform well. How is that harmful to capitalism?

Despite the Reagan recession and its elitist mentality, employees at all levels have become increasingly aware that they are in fact the source of the fiscal good health of any organization. Employee-purchasers have done phenomenally well as reorganizers and managers of firms abandoned as unworkably unprofitable by so-called "professional" managers. When employees become owners and shareholders, that seems a celebration of capitalism in its most fundamental sense.

What is capitalism?

Until the Renaissance, all enterprise was controlled by individuals and/or their families. "The House of Jones" was the phrase for shared ventures of the family Jones and was the practical forerunner of the "corporate family." Control of investment then was impossible where direct observation was not possible. But the capitalist double-entry bookkeeping system, invented by a monk, permitted strangers to share unequal or disproportionate investment with elan. That made possible huge aggregations of capital and the accumulation of the power that goes with money. So a Renaissance invention is at the heart of our modern stock shares and the stock market.

Under the true meaning and root of capitalism, money is not the automatic head, as the *laissez faire* crowd claim. Throughout history, the young of the herd were considered as an interest on the loan of the herd. So "payment in kind" once meant *kind,* or cattle. Our purpose here is to show how hard and fast—and erroneous—are some of the attitudes that shape modern business. You can shape it even more: capital/chattel/cattle = movable wealth! In 2001, *Inc* Magazine finds that the young are making new rules and interpretations: see "Can Business Still Save the World?" Four decades after the Flower Children, the young seem to be finding that *profit* and *responsibility* are not mutually exclusive terms. Shame on the Robber Barons of today—as well as yesterday.

Therefore, because capital and capitalism at origin are merely the recognition that various types of movable wealth (money) can be invested in discrete proportions, which can be maintained and protected throughout the good fortune or bad luck of the enterprise. What the term has become in the American sense cannot be justified by its history.

In the root sense of capitalism, no one can be ordained chief-for-life simply by being possessed of cash. Especially in gigantic enterprises, when the owner/manager has never met

most of his employees, then cash alone was considered the most important of all qualities management brought to the company. But along with the current assault on bottom-line management as a destructive (or dissatisfying) force, the enlightened among us will be bringing new pressures for the recognition of values beyond dollars.

Finally, what most Americans mean when they mention capitalism is America's *historic privatism:* that is, our historic self-reliance and its efforts, presumed to be rewarded.

What's Next?

A number of major American firms have taken institutional responsibility seriously and have created imaginative—some say revolutionary—ways of contributing to the social welfare while furthering their own interests. Remember that altruism does not rule out benefits in both directions.

For decades, for instance, the Minneapolis Plan committed five percent of profits to contributions to social programs and community service. Participants included 3-M and Minneapolis-Honeywell, Archer-Daniels-Midland, and Dayton-Hudson Corporation—hardly the *agents provocateurs* for socialism or communism. Numerous other companies have created special programs to support worthy projects in the public interest, including the Chicago Tribune and Sara Lee Corporation. Even Oprah tried to lift several families out of poverty—not quite with sterling success. People must want to improve, not just take what's offered. But other business groups are going even further.

For a discussion of results variously from labor/management war or cooperation, see *An Autobiography*, by Lee Iacocca, especially Chapter XXVI: "The High Cost of Labor."

Times change. It is possible and even likely that we are entering an age in which the individual will be more highly valued for his creative spark and his innate potentialities than ever before in history. And if that should happen to the accompaniment of foot-dragging and hooting by those of narrow

self-interest, so much the less to be said for the hoped-for professionalism of some managements.

All these concepts and issues have a bearing on the type of projects you might undertake for marketing purposes, whether or not you see the parallels immediately. Here are some guidelines to help you make the most of your efforts.

Guidelines to Motivating:

First and foremost, the programs you undertake should make a genuine contribution to the individuals participating as well as to the company. Lopsided programs tend to disintegrate. Next, trying to carry a marginal program with a lot of hype and promise is to discredit your organization and perhaps other organizations with more-legitimate entries. Irresponsible programs can damage in many seen and unseen ways.

Second, to the greatest degree feasible—which might not be every time—attempt to create early programs with a ripple effect. That is, you or a trainer can attempt personally to train every person under your own roof, literal or figurative; however, if your program can be constructed so as to permit the trainees to become trainers at a later date, you build in a powerful multiplier of your original effort.

True, at some distance from the original training session, your organization's identification as the source might fade, but there are ways to offset that, if you care to. One method is to append a crediting title that will stay in place with all the offshoot programming. Another is to make use of regular public relations releases that credit both the then-current program and its staff, reminding readers/viewers that the concept and pilot program originated with your organization way back when. Still another way is to furnish imprinted books, folders, films, and other educational material, all of which can bear your organizational imprint. Of course anyone can buy advertising instead—and maybe that's just cheating.

However, before being concerned about the potential loss of identification after numerous repeats, remember that you're also talking about wild success and hundreds or even tens of thousands of "graduates." Quite apart from the economic impact they might have in the marketplace, there's a tremendous reservoir of goodwill that is enhanced by word of mouth by the participants. After all, people who have just gained something important to themselves tell their family and friends, too. They remember the donor's name. When you have accomplished that degree of contribution to individual lives and the social welfare, the matter of credit seems almost irrelevant, however important to the company.

Third, be alert to possible cooperative programs. Not every program will enjoy ideal circumstances, of course; so the sponsoring organization should be prepared for alternatives. One of the most logical is to cooperate with another organization that might have similar interests. A modest local effort could be expanded into a program co-sponsored by all the members of a trade association, for instance.

Fourth, don't absolutely ignore colleagues who want to put dollar profits first. They might be able to make major value contributions. Besides most of the uninitiated will bend to your designs once they become enthusiastic about the project. Welcome them, no matter how irritating their original objections.

Human Resources Accounting:

Another way of approaching the money problem is to capitalize social responsibility programs in the same manner in which trade names and other goodwill considerations are capitalized on the ledger sheet.

HRA is an attempt to allocate values to skills and knowhow that have a contributory value even if not expressed easily in dollars when gained or lost and subsequently replaced. Any estimate of the dollar value of employees is just as valid as the estimate of value of a trade name. Exactly what is the Coca-

Cola or Kleenex brand name worth in dollars? Is it exactly what the ledger sheet indicates for goodwill? Or what a conglomerate might be willing to pay to introduce Coke Ice Cream or Kleenex Baby Diapers? Or is it worth what a competitor might say it's worth to diminish the label? Clearly, dollars can't describe *value* precisely. Give it the old college try, and that's close enough for talking ideas.

Although HRA accounting has been practiced in some organizations for a couple of decades, it's still not the norm in the business community, which is loathe to abandon bottom line management. HRA accounting simply recognizes the putative value of the human resource as it would an iron mine, a citrus grove, or a harvest-able forest. All are depletable; waste and careless management can hasten the process; conservation and nurturing can enhance the resource and lengthen its productive life.

Training pays dividends, as does experience. Such HRA accounting has shown that it's usually less costly to retain competent individuals at higher salary cost than to train their replacements. So some of the unused recruiting and training funds can be used for an extra week's vacation to keep an overworked employee happy. In these days of senseless cutbacks, there are a lot of overworked employees and countless ways to compensate, other than direct cash payments. You can save by bending policy. And is your company's policy itself a holdover from benighted days? If so, what do you intend to do about it?

The same is true of an employee pool. What does employee turnover cost the firm each year for recruiting and training? Lost time? Assets and manpower committed to routine training rather than more creative or more directly profitable labor? That sum, however accurately calculated, reflects the value to the firm of finding ways to reduce turnover and increase employee satisfaction; dissatisfaction is often the root of decreased productivity.

And if the program not only reduced turnover but actually increased productivity measurably, would the cost of the program be considered a *cost* or an amortizable *investment*? Or if poor labor relations could cause the closing of a plant for a long strike—or even permanently—what would be the value of the loss? And therefore the value of any program that can avert the closing? These are also aspects of human resources/relations accounting.

When you apply HRA accounting to your social responsibility program, you avoid the trap of trying to find a *direct dollar return* for the dollar and efforts expended. You simply seek other values—precisely the same types of values that make company contributions to the local symphony orchestra legitimate—virtually unchallenged—business expense. After all, public relations value is also an inexact pool of goodwill obtained at a price through an agency and approximated only by the price of a similar amount of paid advertising space. Is that really the "value"?

Enough of the example-making. Significantly, human resources/relations accounting is already accepted as a standard accounting procedure...and your own organization's audit firm will be able to outline procedures and practices that you can apply if such a system does not exist already.

With any education/training program, you are courting and counting on the confidence of people. The general public is capable of rather fine distinctions in its responses to events and interpretations of events. Witness the radical changes in opinion that occur when a colored version of a political incident is publicized and the public later learns it had been misled. Resentment in the public perception seems to fade much sooner than personal resentment attributed to specific company actions or specific hurts (real or imaginary) perpetrated by organization executives.

Operating Incentive Programs:

Public opinion is why the lore of incentives merchandising is rife with tales of incentive programs gone awry: squabbles over rules unfairly written—or perhaps not written at all; no returns or credit for partial wins, for duplicate wins, for compensation if the winner cannot accept the prize awarded. If people have paid— whether in direct labor, other effort, or creative suggestions— they feel *entitled* to the incentive award promised. That is, with incentives, the sponsoring organization is not truly a benefactor offering something-for-nothing.

By trial and error, the incentives industry has worked out a rather dependable set of rules to help assure the success of any contest. These include: a) spelling out all rules and conditions up front; b) providing for complications, such as partial wins or duplicate wins; c) the resolution of any subsequent discrepancies in the underlined employee's favor. d) the fair sharing of dollar benefits of the program; that is, at least half of all profits of each incentive program should be returned in gifts or prizes. In the first year of operation, often one hundred percent of all returns should be plowed back into the programming to assure the critical success of the event, which is more important itself than is the initial difference in dollars. Programs should be multi-annual for residual effect—count the first year's finance as an investment..

For a broad introduction into what the community as a whole can accomplish, read accounts of the City of York (part of Toronto, Ontario) language programs or the book *The Underclass*, by Ken Auletta, that outlines programs begun in the city of New York, USA. And, of course, there are scholarships— how very much appreciated and appropriate for all the parents and grandparents on the payroll. How many people have nieces and nephews and cousins, if they can't use the schooling themselves?

Now to bring it all into perspective: Can you alone duplicate the efforts described here? Probably not. But you could create the outline or full training program in skill areas that can be

utilized by unskilled trainees upgrading into semiskilled or skilled workers. Of course, you can cooperate with other organizations and governmental agencies that have a jump in the area or an interest in mounting a major attack on problems in your local community or city-wide.

Appealing to a More-Sophisticated Public:

Clearly, the maturity of the general public in matters of extreme importance to them has been misjudged. More important, that maturity has been underestimated in what appears to be self-serving ways by not only by politicians—who are always blamed for such things—but also by institutions of other kinds. So poor management techniques *per se,* not merely rapacity or isolated stupidity, is at issue.

Much of what was the *conventional wisdom* of business has no foundation in fact; worse, some of the "conventional wisdoms" still in use have already been demonstrated to be unwise. Yet they persist. They persist in at least some instances because certain persons who perpetrate them seem to see personal advantage in legally—or morally-fuzzy—areas. And so we come full circle on the argument.

Led by Deming's Japanese application of American ideas as noted in *Theory Z*; and keeping in mind the new trend toward corporate long-term good, rather than quarterly or annual bottom-line concentration; and the co-determination of corporate direction practiced in Europe (initially, against the will of American branch firms); and the job-minimizing efforts of early "efficiency experts" or behavioral scientists (now being reversed with job-enrichment and job-expansion programs), you'll be less inclined to decide that the currently reigning established attitudes are automatically the right attitudes; that things that have been neglected in the past should not *ipso facto* remain undone; that an effort to help people to help themselves need not be left to the community or charitable causes. A Ph.D. woman philosopher once startled and pleased her Ph.D. audience by stating what she

called The First Law of Academics: 'Thou shalt not do anything for the first time.'

Countless corporations have loaned key executive talents to community projects—that's not new. But that loan has been criticized by some social scientists as a necessary concomitant of *control by consensus* of the public weal or by representatives of special interests, including business *per se*. What is occurring now—and what indicates the growing maturity of business and the professions and their associations—is the willingness to deal not only with grand civic affairs and macro schemes, but also with the concerns of individuals, seen and addressed sometimes on the micro, or individual, level. That's being expressed often these days via the corporation's matching of cash gifts by individual employees to *their* favorite causes. Is the president's choice of a single cause necessarily better? Public television's fund-raising efforts count on this private decision-making. So do many other groups.

It works as an incentive and, perhaps more importantly, as a motivator reflecting *their* individual value structures. That's a new and powerful force to be examined by business. It's as far-reaching in effect as any new highway, canal or civic center can be and is, on a human basis, infinitely more significant.

As the concern with the ethical aspects of life and labor grows, the topics being debated on the ethical and philosophical levels are multiplying.

Medicine is claiming to be increasingly concerned not only with the patient's right to know (established only about four decades ago), but also with the ethical right of physicians to pull the plug; the legal and ethical implications of in-vitro fertilization of human egg and sperm and termination of that impending birth- "right" and potential life.

Lawyers (remember Watergate?) are re-examining client relationships and the "right" to lie to the court. The new topic of note seems to be sexual relations with lawyers' susceptible clients, especially women in divorce court. More manipulation?

Chapter 7

Critical Distinctions in Training

Even though you do not intend to become a training professional, you will likely deal with trainers or others active in the field, and so you should be conversant with common terms and basic concepts. Remember always that while you are talking about running times and manuscript lengths and training times and delivery systems, you will be dealing in areas of human response. Start from the beginning with five key points:

First, Education vs. Training:

The basic distinction between education and training is essentially *applied* knowledge. The sole legitimate criterion of competent performance in training is the job itself. It doesn't matter how much you *know* the job intellectually if you can't do it actually. Or, another way of stating it is: you can be test-wise and job-dumb; and all the fabulous test scores in the world won't make up for an incompetent performance of a job.

It is the purpose of education to teach you the general principles that will help you to meet unknown new problems in the future; it is the job of training to select from those principles only those needed now to help you to meet today's problem.

In short, from among all the facts and figures that underlie corporate libraries, our media (and our educated lives), training should select only those data among only those theories, practices, and sources bearing on a problem. Trainers organize its specific place in its overall context, interrelating and interpreting it so as to have meaning for a given audience. Then the trainer conveys it, with instructions and/or statement of expectation, and measures its results. Generalities are reduced to the specifics in each instance by the topic's authority(ies) and are

Now that science has advanced to the point at which new life forms can be created by the splicing of genes, who shall be legally and morally responsible for untoward events that result from that new life form? That's a matter still in hot debate. More important in this context, how would you teach your company's preferred attitude and handling?

For their part the professional philosophers seem to be very bewildered by the sudden interest in what had been a backwater of contemplation—ordinary people. They are now arguing the ethics of such matters as corporations which use bankruptcy laws to break union contracts (since resolved only in part by Federal law); those that move out of a community to escape pension obligations to long-term employees; and those that use pension monies to buoy up their own stock while insiders unload it. Whenever people are cheated, moral considerations are in effect whether or not the law recognizes it. Is it impertinent to suggest that the law should serve justice more evenly? Even government is under challenge: is it ethical to withhold food from needy nations to gain political ends? Failure to vote is in fact voting with the feet. Yes, it's negative and harmful. But can it also be desirable and effective? So isn't there a better way?

But more importantly, philosophers in general and ethicists in particular are becoming more aware of the relationship of ethics to the real life situations not only between individuals, but also between the individual and the institution, including the corporate employer. That's reflected in part by the formation in 1984 of the "Journal of Applied Philosophy," which augments programs in operation for several years prior. These days the ethics and practice of "whistle blowing" seems to be resolving themselves toward the obligation of the employee to report his employer's wrongdoing, even though that has in the past been grounds for dismissal without recourse, as an unproved and imputed "disloyalty."

When each of us becomes more willing to assume the responsibilities of citizenship, there will be fewer "institutional" transgressions. After all, corporations and societies are

inanimate, artificial persons—they cannot act except by the will of individuals, whose personal decisions, in turn, become the "corporate will."   Their individual liability is beginning to increase in jury trials. To indicate how deeply this concern has permeated the society, juries have begun increasingly to find officers and directors of offending organizations guilty and liable for the wrongdoing of their organizations.   That concept—although it could have been applied long ago—could never have survived a court test in the heyday of robber barons, including some of their current corporations.   In this new climate, the officers of tobacco companies should be especially concerned.

We seem to entering an age where human considerations will begin to assume an importance nearer that enjoyed by monied wealth and the otherwise privileged during the last century. Can you see that as producing a more desirable society and a more livable world?

When you feel comfortable discussing the concepts of human resources accounting, social responsibility, non-manipulative incentive, and mature motivation, you'll be ready to begin thinking in terms of actual programming possibilities that will have a right to succeed. Then you can get somewhere!

spoon-fed to the trainees, who will probably face similar or identical problems now or in their future. Their future is yours.

By contrast, education teaches the theories and practices and identifies sources that must be drawn upon in different combinations in different future instances of problem solving. No two learners in the educational classroom will solve exactly the same problems in future life, although all solve the identical "problems" in the schoolroom test. There's the rub.

That would be a nice distinction if it were always so clear. However, technicians often need to be taught scientific theory underlying their craft if problems and responses are variable. And a published how-to text could be looked upon as either education- or training-oriented depending on perhaps the degree of general theory it encompasses and/or the individual's immediate need v. casual interest and/or the individual's immediate need vs long-term career interest. However, since the organization does not cater to the employee's casual interests, the same how-to project in the company context would be used exclusively for training to the perceived need. Perception will hold the key. It must be accurate!

In short, from among all the facts and figures that underlie corporate libraries, our media (and our educated lives), training should select only those data among all—but only those theories, practices, and sources bearing on a problem at hand. Company trainers determine the problem/solution's specific place in its overall company context, interrelating and interpreting it so as to have meaning for a given audience. Then the trainer conveys it, with instructions and/or statement of expectation, and measures its results. Generalities are reduced by the topic's authority(ies) to the specifics in each instance that are spoon-fed to the trainees, who will probably face similar or identical problems outside the classroom, now or in their future. Their future is yours, too.

Suffice it to say that education often uses training techniques, and training often uses educational formats for individual segments. There is no reason to separate the two,

since results, not purity of theory, is the goal. Use the word "instruction," and any differences are covered...in conversation only.

The same is true in real life. We learn the alphabet by rote. Except for habitual practice, is there any educationally-valid reason that "A" should come before "Z"? The running-order we were taught as children remains our running-order today, doesn't it? Why? Is there a reason to change it? Similarly, we teach children the sounds valid to our language. Children speak sensical phrases long before they learn the rules of linguistics (such as subjunctive modes, studied in high school, if at all); and yet they, and we, communicate at least adequately in our own language by rote and imitation and inventiveness.

On the other hand, you can make serious mistakes in actuality if you allow a so-called "training" program to educate your trainees to the exclusion of practice that enables the learner to convert information into personal ways, into standard job practice and skills. While education is always worthwhile, it is not the function of job training; it is not cost-effective for the sponsor. This does not preclude the solution of educational problems now underwritten by some companies as a civic contribution.

Second: Individuals vs. the Group:

Sometimes an "educational" approach to training is adopted in a mistaken bid to be "responsive" to the individual. That, too, is a misapplication of the educational technique known as IPI. Job performance is not usually a sometime thing.

Individually Prescribed Instruction (IPI) was a 1960s approach to the problem of the Waring Blender type of public education: all children and young people were channeled through the same curriculum. Before IPI, their special abilities, if recognized, could be encouraged verbally but not directly aided within the classroom structure or standard curriculum. Generous teachers sometimes made individual contributions with after-

hours coaching, but special attention was, for the gifted or slow child, a matter of luck, not educational policy, until magnet schools were developed.

IPI's contribution, as developed at the Learning Research and Development Center at the University of Pittsburgh, was to make *responsiveness to individual needs and talents* an integral part of responsible education theory and curriculum. Originally it was intended to respond to the needs of the underachiever, permitting him to learn at a speed comfortable for him, thereby preventing grade failures. In Chapter 1, we quoted the title of a early how-to book entry into the development, by Dunn and Dunn.

The major drawback to the plan was the human limitation of the teacher. One child or two can be aided, but can thirty or more in a school day? Who has the time in a reasonable school day, even if skilled? Aided by computers, video cassettes, multimedia packages from educational publishers, and resource centers (we used to call them "libraries") offering variety far beyond classroom texts, IPI as practiced today can enrich the general school experience.

Third: Abilities and Cognitive Styles:

The awareness that not all individuals of similar intellectual capability learn in the same way gave rise to the concept of *cognitive style* and to *cognitive maps*. That, in turn, de-emphasized the intelligence quotient (IQ) tests as the standard measure of capability, since IQ tests are biased toward language skills and the predominant culture. For a superior overview of this area, see *Individuality in Learning*, edited by Samuel Messick *et al.*

In discussing this area, Messick distinguishes between styles and abilities. Style, he says, is *how* we process information, and he sets out perhaps twenty styles to be reckoned with. Among them, field independence, field dependence, and field articulation identify different propensities of stimuli against their

embedding contexts and also of gradations between stimuli. To him, cognitive style encompasses perceptual as well as intellectual functioning and distinguishes between risk takers and the cautious types and even between patriarchal and matriarchal modes. Those are finer distinctions than we need ordinarily make in training, but we should be aware.

Ability, to Messick, is *what* information we are processing, measured in terms of levels of accomplishment. Given the organization's need to train toward a given performance, your (and the trainer's) task is to recognize the differences in the ways in which different individuals perceive and process identical materials, but not to confuse that difference with the branching of interests that is legitimate to general education but not usually to the training room.

Arthur Chickering's paper in *Individuality in Learning* stresses those differences. "Increased differentiation, however, must be accompanied by increased integration." He believes that Relationships among parts must be perceived or constructed so that more complex wholes will result. To him, efficient education essentially is the amplification of those two basic developmental processes, and when education works, it makes persons different—both different from what they were and different from each other. On the other hand, training, when it works, should make people more alike in narrow, specific behaviors.

In Chickering's view, training should aim to develop a shared language and skills, information, and objectives. In time that leads to shared values, or what business currently calls a corporate culture.

"Training starts with the task and conforms the user to it," Chickering states. "Education starts with the learner and uses tasks in the service of increased differentiation and integration." Of programmed learning, Chickering observes that the root assumption of teaching is that the student wants to learn what the program has to teach.... Few programs really test that assumption."

Elsewhere, Jennings, Luborsky, and Doob observe that few field-dependent students are found in student-centered institutions and programs. That's logical. If they want hand-holding, the students must go where it's still available.

Let common sense operate. In *Individualizing Educational Objectives and Programs*, Peter J. Valletutti and Anthony Salpino introduce their subject with the caution previously mentioned in Chapter 5 about brainwashing educators.

Fourth: Pedagogy vs Andragogy:

That calls into question the matter of *pedagogy vs. andragogy*, which we defined earlier as meaning *teacher-driven vs. learner-driven*. Generally, putting the subject (topic) area expert into direct contact with the trainees is the most effective way of achieving results. If the time expenditure for the expert is justified by the gain in value among the trainees, then a teacher-driven (pedagogical) approach can be efficient or cost-effective, as well. If the time costs and values are not so easily correlated, look for other methods. But if an expensive expert teaches relatively minor skills to a lot of people individually, that's generally not cost-effective, and other means must be found.

At that point, you might determine that much of the work covered is routine, will not change significantly over a relatively long period of time, and/or will be repeated with a stream of new employees. In that case a machine-mediated program might put the time load on the equipment instead of on the expert himself.

Now, if you have the option to decide on a mediated course, and if 1) there is not a strict need to require each given employee to learn to do precisely (or essentially) 2) the same task 3) in precisely the same way 4) in precisely the given amount of time, then you have the flexibility—for this one task—to attempt a learner-driven (andragogical) schedule and program.

The learner-driven course is ideal for allowing ambitious persons to identify themselves by voluntarily seeking new

learning experiences. And if the organization promotes from within in every possible instance, then a series of courses on the andragogical model, possibly mediated, via computer, video disk, or A/V formats could be worthwhile.

But in all cases, separate your needs from all the education and training fads and fashions and refuse to feel guilty when you are not bending your needs to the fads. Results from your own personal objectives-oriented program will prove the wisdom and efficacy of your position.

Clearly, the best method for designing and implementing any given training project depends almost entirely upon that project itself. Forget the pre-sold methods!

Fifth: Incentives vs Motivation:

It's also appropriate to consider the concepts of motivation vs. incentive...which is itself tied up in the differences between the philosophical approaches of humanist and behavioral psychology. The philosophy—and the ethics of—the organization's ultimate goals has a pervasive influence on the type of project that might be attempted. A full discussion is found in the 1983 book, *Sales Meetings That Work*; a brief account is given here. Let's consider all of these briefly:

Incentives are a carrot, and an externally-sourced reward, reflecting what the offering party wants and what group values are valued. Incentives can activate individuals, causing them to expend somewhat more energy for a time in order to obtain the given incentive. If the incentive should be perceived as a bribe rather than as a gift, a demand for more often follows. Usually the extra energy expended during the incentive period falls off soon after that period ends, although, incentives promoters argue, at a higher plateau.

Motivation, by contrast, is an internally-sourced phenomenon reflecting what the person *is* and what his value structure *is*. It is probably incorrect to say that we can motivate someone else. Any person acts from his/her own motivations

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(lacking threat), and only by helping people to understand themselves and their own (mis-)perceptions of the situation in question can we get them to perform differently over a long period of time. Threat from management tends to drive the superior people away.

When an individual acts in concert with his own value systems, we say he is acting with integrity. A person can be acting with integrity even when acting wrongly if he truly believes himself to be right. So education regarding human societal (or defensible company) value systems might be a legitimate part of any effort to change his opinions and behavior.

The difference between motivation and incentive becomes crucial in situations in which the organization's ends are either less beneficial to the employee's own interests or when that employee is encouraged to work against his own value system for the benefit of the organization. We feel the latter is always a losing proposition in the long term.

In either of these instances, there is danger of coersion or manipulation of the employee, neither of which can be justified in the name of higher profits or increased efficiency or any other cliché of the business community.

Organizations can offer incentives of any description to reward people (not necessarily employees) for any valued action. The reward and the effort should be of approximately equal value if viewed in monetary terms. Or, in some instances, people will trade strenuous effort for the prestige of recognition and peer approval—that's status. We'll come back to these ideas in the next chapter.

What's important in this discussion is that the option of whether to perform the stipulated action to gain the stipulated reward—or incentive—remains with the individual being enticed. Otherwise, pressure is evident, and resentment will often follow. Find benefits, not ash trays!

Perhaps the best example of willing cooperation and contribution gone sour is that of the employees of the auto industry. Employees contributed to the renewed health of the

various corporations with their wage give-backs; however management generally looked upon labor's wage concessions as having been won by management, rather than as a voluntary investment by employees in the well-being of the firm. So, when top managements took huge bonuses while the factory workers were still on short salary, the workers—and their unions—protested and called for new bargaining sessions. The employees felt ripped-off, and they resented management's trickery, as they perceived it. All the good-will and oneness built by contributing had been wiped away by patent unfairness. But then, as Frederick Herzberg has demonstrated (next chapter), the quality of management has long been a dissatisfier, quite apart from the policies being managed.

In General:

When all these variables are put together, it's obvious that at least in general, either the company is going to tutor each and every employee and targeted outside trainee individually or the company will need to forego the educational fashion of the moment and concentrate on the primary objective and criterion (the given job/task itself) and then process the learners in groups, as necessary.

In this circumstance, the trainer (and the training program) must offer two indispensable elements: first, a suitable degree of mastery of the task to be taught/learned; and second, humane regard for the personhood of the trainee, which is not to be confused with that person's idle interests. In other words, if you are aware of the dignity of the person who is being trained narrowly in this instance, you will not be interfering with his ability to branch out in his personal life—and can perhaps aid him in branching out in his corporate life, too. That's what job enrichment and job enlargement programs are designed to do.

Employee response to growth opportunity is changing management's viewpoint on the sizeable contribution even the low-level employee willingly makes. Increasingly, capable

managers must provide for that surprising (to management) discovery. Increasingly, in the new millennium, employees are changing jobs when they feel stagnated because they're *not* being trained!

It is obvious, given these dissertations, that a training program can be "educationally valid" while being inadequate in the training sense. That is, if the trainee can recite answers perfectly on tests but cannot apply them on the job, then that "training" is incomplete, if not a failure. Practice is usually needed to *convert* facts and other cognitive knowledge into performance modes. That's what classroom student demonstrations and workshops are all about.

One critical exception to the "no choice" issue is the preparation of salesmen, for example, to do true consultative selling. In such a case, the consulting manner or structure can be trained-for, but the underlying principles and analytical procedures require educational elements, as well. Book knowledge is imperative to problem-solving in most instances.

If we are agreed that, in general, the trainee cannot be allowed to choose his direction exactly as the college student can, then it also follows that the trainee is far more likely to need a prescribed course than any given college student is. Or, conversely, what the student needs to know is (presumably) already known by management in general (or the training specialist now on the job); and the trainee's opinion about what he should learn is of little consequence, unless it regards omissions. That is, if a pre-med student decides he wants to be a brain surgeon, the medical school does not ask, "What would you like to learn?" The school tells him!

Whether your projects will be addressed to your organization's own employees or to those of affiliated or client firms or to the general public, treat those people with the dignity they deserve as individuals. Tell them what you expect of them and how they can benefit—and let them choose, if at all possible. And in most cases, choice is possible, since the absolute needs

have almost surely been addressed already by your organization's training department.

People are, in the main, quite decent. The more openly and honestly you approach them, the more cooperatively and maturely they will respond. After Hawthorne, that was proved again by PRM for the County of Los Angeles Hospital Risk Management system and by Michael Reese Hospital in Chicago about two decades ago: the more humane the institution's approach, the more cooperative the patient became, even when injured. Why, then, would any competent manager choose to manipulate?

Are you competent as a manager?

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Chapter 8

Fundamentals of Training Systems

All of the concepts and philosophies presented so far have been presented largely as education; that is, as principles that will help you to make specific decisions in unforeseen future circumstances.

The next step is to see how these and other concepts can be applied directly to the training task. In a sense, as you learn to apply selected principles to problems, you are being trained, as well as educated, in the training discipline. Call it *instruction*. If that isn't clear, review Chapters 1 and 7.

Converting educational theory to practical (corporate meetings and training) knowledge and theory was a slow and difficult process, given that these two fields see little cross-over. That was a prime objective of this author's first two books (1973 and 1983). An early paper (1961) and later book (1964) by Robert Gagne anticipated the now-broad and valuable distinctions between education and training and between format and content (see the bibliography). Curiously, the practical side was also exploring this "medium vs message" dichotomy at more or less the same time, through the early (1960) work for major associations of Chicago's (and the world's) original convention consultant, United Attractions, Inc. The findings and theories of the latter company are now reflected in the work of this author, beginning in a Crain's *A&SP* 1970 article and in later articles and books. The group communications industry (meetings, training, and audio-visuals) still tend to ignore or under-value these findings for unspoken reasons. We suggest that there's more profit for suppliers in fads and gewgaws, regardless of their value to the user's program.

Over the past few decades (see Chapter 15), the education and training fields (more separately than together) have codified a *systems* approach to the development of instructional programs

and materials. That system has been refined for intense (and regularly audited) application by military training commands worldwide. It has come to be known widely by the military appellation of Instructional Systems Development.

Although other methods might work from time to time, ISD is absolutely dependable every time—if you don't cheat! In part because military training personnel have moved as civilians into all levels of corporate and institutional training, that movement has created a highly mis-matched situation between military ISD skills and some "traditional" trainers, who operate by-guess-and-by-golly. The ISD people just can't "fit in" with guesswork methods and usually make the discrepancies obvious.

(Reader: Refer now to the Glossary (hierarchical and/or alphabetical. Keep it bookmarked.)

Most private practitioners and the military will group ISD into five distinct phases: to Analyze, Design, Develop, Implement, and Control. See details within ISD itself. Each of the five phases contains numerous steps or subsets, each considered *essential* to competent program development. Although there are choices in some circumstances, you must choose and do! There are many variations of these steps, just as there are now many variations of the PERT (Performance Evaluation Review Technique) developed by the Navy to control the development of the Polaris submarine. All PERT formats represent timed logic, so as to identify and eliminate bottlenecks in complex programs *before* they happen. Yet the sense of each ISD step must be fulfilled. Similarly, all variations of ISD lead to the same end: *the rigid derivation of training requirements from the actual job requirements.*

In our interpretation of ISD for managers, the basic 25 programming steps—stated in the action verbs the ISD technique requires—are to:

1. Determine the nature and scope of both the problems and the program. Generally this is called a *needs assessment* or needs/discrepancy analysis.
2. Analyze the job and identify the specific learning needs within the given job or task area(s) under study. Called a task list.
3. Develop the Job Task Inventory, the must-do's of the overall job training program.
4. Select the task(s) to train-for this time. Select and prioritize individual entries
5. Develop the job task inventory, those job performance measures that become criteria for testing the performance level for those needs. Exactly what constitutes competence?
6. Select the training setting, that establishes/respects the budget (to be) set as well as the students.
7. Develop task training approaches and hierarchies to reflect proper sequence(s) in performance and/or learning.
8. Write learning objectives and Complete Statements of Objectives. CSO's state precisely what needs to be accomplished under what circumstances and with what measurements of performance.
9. Develop test items. Do not confuse written answers with correct response (performance) on the job.
10. Plan for remediation. Not everyone learns fast or remembers forever—plan for repeats and corrections or other adjustments.
11. Verify trainee entry level behavior. What must your new hires *really* be able to do? No blue sky.
12. Determine program sequence and structure. Many fine programs would be equally valid in several running orders. So choose the best or one of the best. Whether windows are painted before or after the walls are painted is probably a matter of opinion—if you're neat! In any case, the decision should be defensible.

13. Identify the best instructional delivery system. On occasion savings can be substantial with small trade-offs, but never sacrifice potential success to arbitrary dollar savings. Nobody remembers how much money a failure "saved," but any failure might be remembered for years.
14. Prepare the curriculum to become a Master Plan. Do not include unnecessary, or do not eliminate necessary, tasks/steps.
15. Evaluate existing course materials. Occasionally you can lift something valuable, but most often the old materials are out-of-date.
16. Coordinate the approved concept with the developers and writers. This is not a starting point for any program, even if it's the starting point for outside help.
17. Develop group-paced instruction, if that is to be used. If job turnover is slow and jobs are few, don't wait a year for a group to form! You can convert materials later.
18. Develop self-paced instruction if that is needed. If spotty hiring is the issue, develop both kinds of programming.
19. Validate the instruction developed. No training program is "successful" until "graduates" prove that they can do perform resulting job! Passing written tests alone is not a criterion for motor skills!
20. Produce support materials. Here's the place to save money on color vs. B/W, or stills vs. motion, as previously discussed. Buy what you need, not what Jones bought elsewhere.
21. Operate the program you've just designed, exactly as planned. Don't allow variables or you might never identify problems, if any.
22. Manage the marketing program that should be supported by the training program. The programs will *not* take care of themselves, no matter how much they're needed.

23. Conduct internal evaluations. Be hard-nosed. Can every graduate do the job? If not, something is amiss. Identify any problems before continuing. Internal in this sense refers to the training staff/contingent and classroom.
24. Conduct external evaluations. Who do you trust among outsiders? Get reports and specifics. "We like it" and applause count for little or nothing. *External* refers to subject-matter experts or other third parties not under your direct control daily.
25. Revise inadequate elements. Because of the iterative nature of the ISD process, there should not be any major discrepancies. But short cuts and other "no-one-will-notice" decisions can matter out of proportion to their seeming import.

There they are: 25 steps of a complete training program. These breakouts are represented in chart form in most properly-prepared ISD how-to books. No one can shorten the process, although items become faster as you become familiar with the process. Also, such elements as the audience(s) can become relatively standard, although you must consider that new hires of differing experiences change the audience makeup more than most persons realize. Strictly, these 25 steps are categorized in five distinct phases of ISD: Develop; Implement; Control; Analyze; and Design. For context, see the actual how-to structure of *Common Sense ISD*.

Speaking of Perfection:

In ISD, as in all competent instructional programs, refinement toward perfection is a never-ending task. That alone tends to keep programs relevant. But if adjustments and improvements are continual, when should you switch programs? The answer is, "Whenever you must." New products, new people, new processes, new materials, new customers. What else? Buggy-whip manufacturers never planned for jet engines

but cannot be blamed for not crystal-balling. But they're just as gone. Could they have adjusted and saved themselves?

Any given course related to a given product or skill can remain valid only while the product or skill remains absolutely constant. So you must anticipate or adjust to significant changes, including obsolescence and new inventions. Moreover, additional adjustments are required to accommodate changes in available skills of employees or even changing expectations of current or prospective customers.

Because any house training staff tends to believe in its own competence (justified or not) and because perennial classroom duty leads to isolation, the training staff might be fully capable of making refinements but is often not truly capable of actually determining whether the refined and functioning program reflects today's real world—if it ever did. That's why experts in subject-matter (or content or topic) are needed. Therefore, ISD provides for both continuing internal evaluations and also for periodical external evaluations: the cold eye of the disinterested third party is essential. If the external (or third party) evaluation validates the current program, all is well. If outsiders should uncover discrepancies, the ISD process begins again with a needs (or discrepancy) assessment and adjusts or creates according to need.

The third party auditor can be an outside consultant but need not be IF disinterested company staff with the proper skills and perspective can be found. Generally the skills required of an internal staff auditor include an absolute knowledge of the task or job under study so that he can say with assurance that the training program *is* or *is not* creating the needed level of performance skills in the trainees. Subject matter (content or topic) experts can often double as internal auditors.

The obvious drawback is that often the external staff auditor does not know training procedures and cannot go further than commentary on the degree of success of the current program. In other words, the staff auditor might typically say, "This program is/is not working satisfactorily, but I can't explain why." You or

someone must then know training theory in order to correct the situations.

The consulting auditor, on the other hand, might be familiar with the general aspects of his client's trade and also expert in training techniques but is almost never the ranking expert in the client's own product or service. That expert should already be on your staff; so a tandem arrangement (with neither person duplicating the other's efforts) could save time and money. Therefore, the consultant as auditor probably approaches the training program first from its functional aspect, saying, "According to the needs you state, this program and these methods can/cannot achieve that stated performance level, because:...." He probably cannot work, in most instances, independently of your (subject matter) experts and likely must interview them.

However, outstanding results can be achieved at lower cost when a staff content expert works in tandem with a consulting program development expert because both spheres of expertise are accessed simultaneously and immediately, without first requiring either party to learn the discipline of the other. So a tandem arrangement (with neither person duplicating the other's efforts) could save time and money. Synergy tends to meld the pair into "one" super-skilled auditor.

An audit of training—just like the audit of any financial statement—begins with the facts *as represented* and deals with internal consistency *unless and until a discrepancy is discovered* either within the presentation or against standard practices and procedures of the training field.

In either case, the "facts" can be false but consistent or the goals can be unrealistic; but the audit simply says that what exists now is or is not what it claims to be, consistent with general principles in its field. That's why the quality of the auditor is salient. If he cannot spot false entries or inappropriate methods, then a slick but inadequate program could be "validated," with potentially disastrous results.

If discrepancies exist, the auditor will review every step of the ISD process, if necessary. Ignoring all previous decisions made by the time he reviews the existing needs assessment, he'll determine in isolation what you believe to be the needs at the moment of the audit and will commit that assessment to the writing of a new Job/Task Inventory. The two Job-Task Inventories might match (and he'll look elsewhere for work) or they might not, and he then has at least one point of discrepancy to correct. You should never repeat false information to your auditor in order to save face, or the problem(s) could remain hidden forever.

If the two Job/Task inventories do coincide almost exactly (although there are problems on the job) the chances are good that your program needs are accurately stated but your content or instructional delivery systems are not fulfilling the performance objectives set. If the task inventories/needs lists don't jibe, either one inventory list is faulty or the job itself has changed radically over time: determine! Knowledge-based tasks are especially susceptible to change.

Next, course content and instructional delivery systems should be reviewed against the twelve algorithms of ISD plus the setting. Then the subject-matter expert or auditor will look to the test situations and performance criteria. Do the performance/achievement tests accurately reflect the needed skills? If not, there's one culprit identified. If the tests are valid indicators and if all the other items check out, then the fault probably lies with the instructor(s). Although a superior instructor can often rise above mediocre written material, a poor instructor almost always degrades even the best materials. The auditor's job is not finished until he has either endorsed the existing program or has pinpointed one or more causes of programing inadequacies and has suggested corrective measures.

As you can see, any audit both follows and fulfills the dictates of the five key phases of ISD and its programming steps, although a skilled auditor might suspect certain elements before returning to reassess needs. Wisely, examine the ISD process'

internal relationships as well as its elements. Not surprisingly, the entire task of your overseeing the creation and operation of any training program will consist essentially of your scrupulous attention to the <u>sense</u> of the five phases and the 25 steps (more or less as presented here), even if details don't apply to you.

But while we're still dealing with principles and generalities, we can develop a more instructive background for the workings of ISD by becoming familiar with the underlying concepts and terminology.   Here are some critical and interrelated concepts, each with its own subsets:

1.) *Educational Universe:* There are usually considered to be four distinct categories within the educational universe. These are general (or grade school and college) education; or pre-employment (college or trade school) specialization; or job-entry level (company provided) knowledge or training; and career training, including retraining and continuing education.

2.) *Proficiency (or Skill)Levels*: Obviously there are many levels of knowledge and skills within each of the four distinct educational phases; and different aspects of the same type of job will call for different combinations of similar skills, whether cognitive or dexterity in nature. So for practical purposes, you should consider that there are three main levels of proficiency (training intensity or skill levels), as given below:

   a)   the *absolute mastery* of the given task or problem area; no coaching is permitted or tolerated. This is the level of proficiency required by medical surgery and other exacting fields.   The pilot of a plane is expected to know his job perfectly. Nuclear physics or skyscraper design are also demanding occupations, but reference works and associates are permitted.   If the consequences of failure are momentous, this is the professional level of training

that is needed. It could be the level of field repair service for complex electronic gear, where security is affected and speed is essential.

b) the *practical command* of the task or problem area using available references and documents. At this proficiency level, the trainee can solve the anticipated problems himself by using prescribed materials or phoning for information and advice, if needed. This level is applicable to office workers using how-to manuals or to technicians making bench repairs, where tests and adjustments can be made until correct.

c) the *general familiarity* with the topic. This category implies that the trainee must be able only to recognize the problem symptoms and be able to call in the proper experts to do the work. This proficiency level is usually appropriate for a salesman of complex equipment or complex services, such as hospital radiation equipment or advertising or consulting, where the critical work is done by other than the salesman. It tends to be the level acceptable for the company telephone operators, who offer connections rather than answers.

Clearly a given product or service would require different proficiency levels for different responsibilities related to the same type of skills. For instance, if you developed a product which featured an Elaborate Gizmo (trademarked), your engineers would possess design and structural mastery; the assembly line would need to develop related dexterity skills of either mastery or practical command, depending on precision needs; the marketing manager would need the practical command of state-of-the-art knowledge re: competition; the advertising manager would need whatever level of knowledge is needed to write convincingly to buyers at their level; the

salesmen would need a general familiarity of product function required to demonstrate the product features; repairmen would need absolute mastery or practical command, depending on product complexity and locus of repairs—field or shop bench— and the customer service telephone people would need whatever level you prefer.

And so on. Obviously, multiple <u>related</u> training sequences on the Elaborate Gizmo should result. These different proficiency levels for related skills might not be so evident as a service or for an educational program still in its hypothetical or developmental stages, of course, but the concept holds. Notice the abundance of common sense in it all.

No matter which of the three proficiency levels your instructional project requires in which of the four categories of the educational universe, the task(s) to be "trained-for" will tend to fall more or less into these three major categories of the third critical concept:

3.) *Learning Domains:* The knowledge being transmitted in any single element or task can be fitted into one of three categories predominating; either a) cognitive or b) dexterity or c) affective/learning states. Complex jobs, of course, are characterized by combinations of these skills. Regarding:

   a) *cognitive* or informational skills, including reading, arithmetic, facts and concepts, and so on. What the trainee knows or can deduce is salient. Accounting and most analytical work belong here, as do most sales jobs. Here, their understanding is fundamental, and written tests often suffice to prove comprehension and possibly competence.

   b) *dexterity* or psychomotor/manipulative skills. The trainee usually must practice a psychomotor or psychometric routine in order to achieve the desired competence level. Riding a bike or parking a car are

skills in this domain; so is the task involved when asking a salesman to operate a film or video projector while promoting his product. Here, understanding is inadequate to action, and practice is essential. Demonstration is the sole acceptance criterion.

c) *affective* or attitudinal states. What the trainee willingly does <u>well</u> often depends on his perception of the reasonableness or necessity of the task he's being asked to do. Attitude training is a frequent companion to absolute mastery or quality control programs. Because the company can never measure any trainee's innermost thoughts, *compliance* and cooperation with standards and policies is the test.

For example, the manufacturers of pharmaceutical or assembly of electronics often require white gloves in air-tight clean-rooms. Employees sometimes resent or are lax about procedures until they understand the negative consequences of fingerprints or dirt on, say, a patient undergoing a hospital treatment that uses the product of your employee's labor. Except where the will to excel is similarly critical to the basic job, attitude training is usually offered essentially in advance or as a remedial measure in specific trouble spots. In a social service context, hope and enthusiasm can be bolstered in the unemployed or underemployed person about to participate in job-entry level training or job-search skills.

However, it is essential to realize that in interviews taken with the language handicapped, for instance, the majority of poorly-equipped speakers felt they were adequate. Self esteem is important, but it is no substitute for competence!

All of those concepts impinge on the identification of the particular learning objective and training objectives within the given job or task area(s) or scope of the project. The *master syllabus* (controlling outline) for the program will list every significant topic area in a relational context; and the course

outlines (Instructor Guide and lesson plans) will list every significant task and step/element that comprises the job and overall program. The outlines will establish the proficiency level of training required and identify the domain in which the training is taking place.

Any professional trainer or auditor will be able to "sample" the program context by reviewing the master syllabus and course outlines without sitting through the entire program. This assumes trainer competence, which is not a foregone conclusion.

Many auditors choose to sit through at least one or two sessions so that they can compare the classroom event to the paper and so to interpret the paperwork more accurately. The most efficient program will assign to each task exactly the amount of time required for the agreed percentage of learners (in a norm-referencing mode) or all learners (in a criterion referencing mode) to demonstrate proficiency to the average stipulated level (norm) or to the minimum adequate performance (criterion) level of achievement. Under learning can waste everything; over learning is not cost efficient. Think *needs!*

To decide arbitrarily to allow, say, one week for training could be counter productive or damaging, whether too long or too short, because the boredom associated with the first could adversely affect the trainee attention spans and results; and the insecurity and semi-competence associated with the second could jeopardize long-term retention of learning.

The ultimate proof of results is NOT either the written or dexterity test that concludes each learned task and course in the classroom—the ultimate proof is the field performance by those same individuals, if that their destination/assignment. Forgetting knowledge or skills (called *decay*) and the interference of old and new skills with each other (such as re-learning any changed key positions on various computer keyboards—not painful but very aggravating) are just some of the concepts with which training professionals must concern themselves in major long-term programs; but those esoteric skills of psychology and human learning should not be barriers to your overseeing the

Chapter 9

Exploring Your Options

It's one thing to consider philosophy, sociology, education, training, and business techniques in the abstract and quite another to see them in specific instances. It is still different to think beyond the traditional avenues for making civic contributions—for instance, gifts to the local orchestra, the opera company, local theatre troupes, and public television program sponsorship. These are perfectly valid responses, but they are not within the premise of this book, which looks to instructional training/education and the group sessions that contain it.

If you hope to manage and perhaps market through training, you will move away from the dis-involved gifts of the traditional type and move toward direct contribution to the solution of identified needs and problems. Your own awareness of the scope of needs will determine in part how broad a response your organization can make.

While all of these facets or considerations are important to your foundation, these pieces are not themselves the program elements that you will be training-for.

Actual programs will fall into either one of two categories each of which has numerous subcategories:

1) product/service, or
2) public service.

The first major category is product- or service-related instruction for market support. Here you might be dealing with

      a. the improvement of existing programs or the penetration of market to greater depth (what percentage?) with adequate (in the training sense of fulfilling needs) programming; or

development of a project concept or two for any legitimate managerial purpose.

Competent programming professionals will be prepared to perform the appropriate tasks automatically, if the elements apply. And if you lack the budget for commercial program assistance, you can always ask for advice at local trade schools and community colleges. Be prepared for educational answers that might not be practicable as training. Extrapolation is usually possible. Whatever the proficiency level or domain, you must demonstrate your trainee's achievement. Therefore the proficiency tests must be *observable, measurable, and verifiable* both in the classroom and also in the field. Measured results, not claims or estimates, prove the value of the program and its design. The show business "proofs" of success, such as compliments and applause, are meaningless in the sense of measurement, even though commonly offered.

As the training discipline has evolved over the past few decades—and ISD over hardly a couple—many terms have been adopted to clarify ideas; and so a training jargon has evolved. Unfortunately, several terms are sometimes used interchangeably, and that can create confusion.

Yet, your understanding, not terminology or jargon, is what makes programs great. If you understand the function that must be served by each of the programming steps, you will succeed despite an occasional lapse of terminology.

Familiarize yourself with the glossary of terms and refer to it whenever you encounter critical distinctions in the remainder of this book and/or in your actual programming efforts. We have both followed and ignored traditional alphabetical order in order to group related terms in a more progressive sequence of tasks.

As you can see in a quick viewing, there are many fine and even critical distinctions that must be made if you are to define your needs with precision and then fulfill them.

Any amount of fuzzy or sloppy thinking affecting your judgments between the inventory of tasks and program implementation can degrade the performance of the ISD system,

the program itself, and any future training or events dependent upon the program. As the computer has taught us: Garbage in— garbage out!

More important, the distinctions evident in the terminology have already given you a new set of analytical tools with which to dissect any given job into its task components. That, in turn, lets you evaluate the real world of instruction to determine with a degree of confidence whether the existing or potential programs you're mulling a) must break new ground in major areas, or b) might make significant contributions with lesser changes and refinements.

Yet, all these glossary terms and pieces together don't make a program, because the pieces don't have an automatic programmatic relationship.

You provide that relationship after exploring the overall potential for both industry-related information and technical programs and/or community/social service programs for marketing purposes—before you begin to implement the ISD process itself.

Clarifying these programmatic relationships is the objective of the next three chapters.

    b.   the creation of new programs relating to current products/services; or

    c.   the creation of new programs relating to projected new products or services; or

    d.   your own understanding of community/national events and opportunities.

Points a) and b) above should be self explanatory. The progression of a products-oriented company to the related-services arena indicated by item c) above has long ago been outlined in the article "Learning to Love the Service Economy," by Irving D. Canton (Harvard Business Review, May-June, 1984).

Canton there established "ten routes to entry" into related services: systems selling in business markets; systems selling in consumer markets; capitalizing on corporate knowledge; capitalizing on corporate physical resources; financing customers' purchases; contract management and shared services; creating national chains; integrating forward to distribution; privatizing public services; and responding to unplanned events.

As you can see, several of these methods are well-entrenched today. Canton cautions that the corporation will be most open to opportunities "if a company has not unalterably fastened onto the idea that the only way it can earn a profit for its stockholders is by producing tangible goods." That can be seen as a disguised criticism of blindered managements.

The ISD structure itself usually deals with the assessment of such needs and guides the development and production of the program; so these activities will not be considered here.

The first major category for public or social service would naturally involve any helps or advances or changes that would relate both to your product and to the society at large.

Even a seemingly minor single action can provide a public service: Mattel Toy company had barium added to its plastic pourings of small (swallow-able) parts so that any items ingested

by children would show up on X-ray. It's a small, virtually free change that works a valuable public service. Kudos!

Yet it's almost irrelevant to "success of the program" whether the given program loses money, breaks even, or earns a surplus (which ideally is plowed back). It is also irrelevant whether the topic(s) or skill(s) being trained-for is/are related to your product/services directly or are totally unrelated to the firm's business activities. Credit accrues to the sponsor in either case and therefore has value. Ultimately you will need to determine whether cost or value matters to you more.

The second major category is instruction for public or social service. This group is a common answer to felt needs in the immediate neighborhood or larger community surrounding company physical plants and offices. "Adopt-a-school" plans would be considered part of this group. Charitable or other matching-grant programs are also an easy way to contribute. It is essential to understand that a publisher's program is not necessarily doing a "social service" by marketing school books, for instance, even though its product is beneficial. Is that publisher's product *responsible*? No company has a "right" to damage the public interest by putting self-interest or profit first. Or your organization might do a social service by purchasing and donating those same books to the same school if the books are worthy and if you are not profiting directly.

If your prospective programs should seem product/service-related in the first go-around, your task is really to identify the areas of expertise that might have a highly useful life outside the traditional channels without giving away proprietary information or aiding competitors. Teaching typing to housewives would not damage a typewriter or computer manufacturer. Nor would teaching nutrition classes damage General Mills. It seems to be very much a matter of will as much as of ideas.

Avoiding damage could mean either becoming too general to offer the firm credit-value as a sponsor or else it could mean programming with a rather tightly-controlled universe—say, established dealers and representatives only. Immediately comes

the question, "If clear needs are readily apparent, why haven't they been addressed sooner?" Answer that question for yourself, even if it takes some amount of effort because you could be identifying a weak link in your marketing chain.

Once you know what's available in formal programming for internal training purposes, you can probably hitchhike on established material. Fellow managers can try to identify numerous possible uses for the same or similar material in a brainstorming session. Later evaluation might uncover worthwhile leads to be pursued.

Evaluation guides located in Chapters 9-12 will help steer you through the process of inventorying existing training programs and identify potential training programs. Any could form the nucleus of a broader marketing program and also help in targeting audiences. At this point, it's important only to understand relationships. Do NOT start by picking programs!

Although you yourself are your own authority (at least, for the moment) in the product/services category and will need little outside help, that's not necessarily true of open programming. Down the marketing chain, the quality of performance will help to shape your plans and could dictate them, especially when the numbers of sales prospects approach those of the general public.

In some cases, your organization might simply decide to sponsor a fully-developed program originated elsewhere. That might be a logical way to enter the education arena, especially if your organization does not have individuals with advanced education degrees on staff. This is not to say that degrees themselves produce good ideas; rather, many educators are so degree-conscious as to dismiss out of hand a valid and valuable program created by uncredentialed individuals. Yet even that consideration must be tempered by the knowledge that not all of the things any educational system should have addressed have in fact been addressed. That is, there are a lot of pressing needs out there that nobody, regardless of training or specialty, has answered. So there's opportunity as well as blame.

The fact of education crops up again and again simply because there is no end to the types of needs which are felt by thousands and even millions of native born school drop-outs and naturalized citizens—much less the legal immigrants with working papers. Outside all jurisdictions, and therefore most official planning, is the illegal immigrant, who is subject to harassment and even blackmail as he attempts to make a life for himself by using poorly-paid, no-benefits jobs or public services and the changing welfare system. No fault given to their employers, company or private?

Reading, writing, and arithmetic are the obvious and basic needs for anyone trying to survive in a society as complex as ours. But for those who have never attained the social or job-interview skills needed for even the most simple job placement, there is little hope of landing a job, much less of earning advancement. As a result, remedial basic education is already a Personnel Department's requirement for entry levels at the corporation. You could possibly "borrow" existing experience for your own purposes. If so, what will you give back?

Although most of us don't like to bring such thoughts into our daily lives, the grind of the daily life of the underprivileged is pitiable and cries out for assistance. Some individuals, groups, and national volunteer networks have taken onto themselves the responsibility for educating certain groups, although the task as a whole is in shambles. Because language is basic to mainstream jobs, only politicians and ad agencies benefit from encouraging their constituents/wards *not* to learn our language.

Literacy Lifelines as Example:

Paramount among organized, low-level operations are some literacy groups that can be found in most major cities and ports of entry. Some are civic; some, church-based. All of them are eager for support...not only monetary, although that's the obvious route to quick participation, but also for new participants—tutors recruited from among your organization's

staff. Such groups often have the textbooks needed for teaching, and they even have trainer-training sessions that can turn any speaker of standard English into a creditable language tutor in just a few evening practice sessions. Be wary, so that the group you approach is not just a funded tutor-training group in disguise, hoping to make a profit for its own management structure regardless of value to the community.

Your organization could make significant contribution in that field—as a single instance—by an either-or-both combination of funding and staffing. It could be fast, direct, measurable...and garner favorable publicity besides. You might identify intelligent prospective employees among the students, and that is a great plus.

Most of the independent literacy groups concentrate on the beginner—that's where the government money is. After school grade 5.9 (or sixth grade ready) the pupil is abandoned—so the government itself makes immigrants barely competent and then abandons them. Occasionally a pupil is taken (at his/her own expense) into a program designed for advanced language skills. Yet all these programs together are dealing with only about 10% of the estimated need. Many immigrants (and native language-handicapped, too) are waiting for a magic pill that will enable them to speak properly tomorrow. They are avoiding entry into any system whatsoever. Ethnic organizations should promote English-language learning!

Within the corporate walls of any organization that uses unskilled or semi-skilled labor could be a small group or a relatively large force of language-handicapped individuals. The range of skills is staggering. These include persons who have had some formal training in English but do not use it properly or fluently. There are others who can make themselves understood in English with the listener's cooperation but have had no training and so, mutilate the tongue. There are still other workers who are embarrassed to admit that they don't comprehend conversational English beyond basics (especially if written) and so will not admit to the supervisors that they have not understood

the instructions just given. Usually those folks hope to have bilingual friends translate for them...in another place or day. Meanwhile there can be chaos. Such prospective employees are all subject to various degrees and causes of dissatisfaction on both sides of any disagreement. That, in turn, means that the hiring organization can benefit doubly by pro-active efforts: first, by helping employees better to comprehend their supervisor's instructions and thereby perform adequately; and second but better, by gaining the respect of the language-handicapped individuals as a group with a program that aids them outside the company just as much as inside. Help them to live a better life—that's why most of them came here!

We have personal knowledge of this relatively narrow but extravagantly important area, having published a 16-hour tutor's self-help book that helps teach ten middle-level individuals to sidestep their own vowel system and master the dictionary key to pronunciation. "Hooked on Phonics," once ubiquitous on TV, came later. Other language skills are taught in our book/course, too, including reading ads, understanding newspaper headlines, and using prepositions as markers. The result is vocabulary-independence in only eight sessions of two hours each. Some of the funded literacy groups hate the course because it's so brief and cheap. Is it irrelevant that the course has proved itself in the field? If so, how will the nation win? So be guided by that experience.

Moreover, there's a pressing need to help native-born Americans who do not speak standard English but can still communicate well. They are sometimes worried about street accents. Our class helps to minimize accents, as well, but that's of secondary importance to most learners. Understand that accents are only words mispronounced according to the original/major tongue spoken. A student once mentioned that she was proud of her ethnic accent until we mentioned that it was only the result of mispronunciation, not heritage. Then she changed her mind and learned!

Remedial work is needed but difficult to institute except in formal settings, against which many of the most needy language handicapped are already prejudiced. As understood in Chapters 2 & 6, the underclass is beset by "poverty pimps" who by "sponsorship" prey on those populations. It's difficult to identify them from sponsor claims alone. Just be as sure as you can be that you are dealing with reputable organizations and individuals.

Prejudice against any outside help can run strong. Depending on the circumstances and your contacts, you might be rebuffed by the rip-off artists, who don't want to see their own strength diluted by substantial programs from other sources. You might be considered more a threat than a help by some of the vested interests at work, even within the very camps that most need your assistance.

There is also a prejudice against taking help from the "foreigners," as some groups see Americans. If so in your community, it's wise—and sometimes even necessary—to fight the political forces that foster this attitude in order to gain strength for themselves. Or, if it should be your staff person who will be your intermediary, that company representative should speak the given foreign language(s) if possible, so as to gain face credibility. Then work internally (within that group) for change.

So along with opportunity, there will be abundant problems. Solving them might call for almost as much finesse and diplomacy as expertise...but the psychic rewards are great.

Keep in mind that all of the avenues for providing help, and all of the caveats about ethnocentricity and opportunism discussed here, have originated in only one area of one need— the language problem. Now give your opportunities some careful thought. Do you agree that prospects are unlimited? If you decide to proceed, you will probably find help in this author's tutor workbook, *Practical Word Power*.

In the context of training programs, *PWP* is noteworthy in that it is a double-barreled training program: it instructs the tutor while simultaneously instructing the students. Except for

specified resources, such as advertising or newspaper clips, it is self-contained. All related knowledge that a tutor requires in order to teach this course is included in the book, including verbatim script. Anyone who speaks standard English can therefore become a tutor of a group of up to ten middle-competency students. Therefore this nation's non-teacher, standard-English speaking population can help to solve the illiteracy problem as the educational establishment apparently cannot.

Our purpose in this protracted discussion is not to sell you or your organization into the English-lessons arena. Rather it is to indicate just how broad is the need—and how rampant the opportunity for you—to participate in helping to solve one major national problem. The problem has, if fact, been termed a national disgrace, because upwards of twenty-million adults, by conservative estimate, are language-handicapped. In his book, *Prisoners of Silence*, Jonathan Kozol indicated the number might be as high as sixty-five millions (or triple the number of military), depending on the criteria selected to describe the given handicap.

If you haven't already been unsold from considering the vast area of non-corporate human needs and curiosities that fall somewhere between computer lessons and language lessons, then you're about to begin a tour of a fascinating universe of blatant and subtle needs, casual and committed attitudes, low intrigue and high humor, and boundless satisfaction for both you and your company. Overly-sensitive safety mechanisms regarding the less-privileged are so much excess baggage; ISD has all the required safeties built-in.

The worst piece of equipment you can carry on your tour of opportunity is a closed mind! But if you are open to the kaleidoscope of humanity (some of it less than desirable, admittedly) and if you retain your sense of adventure and apply a measure of inventiveness to the facts and impressions you gather, then you could be on the brink of making a major contribution. In Abraham Maslow's terms, that's a valid

indication of self-actualization: the *becoming* and the *giving-back*.

Staying in the area of non-scholastic education, you might consider teaching the job-interview skills needed. You don't need to be in the music publishing or instrument-manufacturing business to consider giving free music lessons or buying instruments so the local school can begin (or reactivate) a skill and joy not essential to the 3-R's, but quite assuaging to the soul.

According to the College Entrance Exam Board: Recent (1996) studies indicate that students experienced in musical performance score 51 points higher on verbal SAT and 39 points higher on math. See what we've "saved" toward petty tax refunds by being "practical" in school? Arts matter, too.

Alternate Strategies:

Advice at the survival level is not easy to offer—rather, not easy for the needy to accept. There's a ticket price for everything in life, whether or not the needy accept the concept. Set a price and let them choose. Investment firms have no embarrassment when offering advice to the middle and upper income set. Why can't the basic skills of budgeting, handling credit, seeking quality, etc., be offered by more firms other than banks? Pharmaceutical houses and others engaged in the healthcare industry have long sponsored seminars and training films for medical practitioners and technicians. Topics have ranged from treating burns to identifying and dealing with instances of child abuse.

Although it is true that most professionals have been exposed in the classroom to the ideas then-current in their respective field, their (classroom) educational syllabi are simply too crowded with the essentials and minutia of individual professional trades to permit adequate training in areas that relatively few students will later specialize in. Therefore many significant topics fall through the cracks and are ripe for refresher or even how-to sequences (live, packaged, or filmed).

Prime among these areas might be advanced human relations training, to teach the difference between *professional cool* and *unprofessional cold,* between compassion and involvement, between reserve and unconcern. Sometimes a good cry *does* help.

Don't overlook the physically handicapped, shut-ins, and their often-involuntary (adult) "babysitters" when evaluating healthcare alternatives and options. Can you advise, or give/ lend products, such as TV sets or cable service? Construction firms, real estate firms, and manufacturers and retailers of hardware and home-repair materials have been the logical sponsors of community-wide paint-up/fix-up weeks for decades. But anyone can help give a face lift to a neighborhood through group effort, instilling a sense of pride and cohesiveness that otherwise might be lacking.

But there are countless other ways to help specific neighborhoods (and even small towns) to rekindle a sense of community. Right up front would be efforts to establish or expand or re-equip a community center; develop a sports complex; fund and build and/or staff a community swimming pool; organize a school marching band. Let your imagination run wild...the kids are already thinking far ahead of you, anyway. Where did your gang hang out in the Good Old Days? Street corners are now dangerous—what kind of alternatives can be offered?

And if it wouldn't bruise your ego too badly, why not ask the young people themselves just what they might want if they join you in working toward a goal? It's amazing how much they know about what they value! Everybody knows that major cities have a gang problem, and working with the local Police Departments—which actively seek outlets for nervous and competitive energies of gang members—you can get involved in some heavy but important programs. These programs aid not only the known, active gang members (who might be beyond quick retrieval) but also the early teens, who are being pressured by peers to join gangs and by parents, to stay away. An

alternative provided by your organization could help keep a youngster's future more secure.

Thoughts On the Elderly:

Not long ago, our youth-conscious society was in a quandary about old people, who are making up an ever-increasing segment of our society. Early programs for assisting seniors seemed to be concerned with keeping them occupied...which was at best a patronizing approach. Then the Adopt-A-Grandparent type of school program began to emerge, whereby young people in search of roots (or just after-school predictability) were encouraged to visit with and get involved with the elderly persons in the neighborhoods, to run errands and discuss the problems of growing up. Later, some else discovered that some of the old folk know something about life and business, and tapping their mines became popular. Unfortunately, Colorado's Governor Lamm suggested that old folk had a duty to die; if it was an unhappy truth, unfortunately the messenger was punished—as is American history!

Survival is one of the topics on which the elderly are expert. And in the process we have come to discover that these elderly are in need of probably little else (assuming physical and medical care) more important than a sense of being useful. None of us outgrows the need to be needed. Somewhere in this continuum of age—and somewhere in the neighborhoods where your office and plants operate—are elderly folk. They might be living in their own homes and need a hand with chores; they might be living with relatives, some of whom could be your employees. No, you can't take on responsibility, but could you share insurance premiums or help fund a new senior center? Some of the seniors might be living with relatives who need a night out—some of these could be your past employees; and they might be living in retirement or nursing homes, forgotten. But all are there if you wish to see them.

Last—and potentially most significant because of its enormity—is the problem of what to with those individuals whose initial job skills have been made obsolete by either technological advance or management mistakes that have caused entire industries to be eclipsed. Remember that railroads thought they were in the railroad business rather than the transportation business when trucks and airliners appeared. That myopic view cannot be blamed onto employees. According to laissez faire capitalism's tradition, profit seekers must look out for themselves, and everybody else should do the same. But in an age in which governmental leaders globe hop in search of a free lunch, and where wars are fought on the living room TV screen during dinner, the fictions of insulated social segments and interests cannot be maintained. Inter-dependence is fact, like it or not. Your programs can make a difference.

As Buckminster Fuller expressed it, we're all passengers on the Spaceship Earth. Nothing which adversely affects any significant portion of the space travelers can escape affecting the ship. That is, of course, a poetic way of expressing the Eastern concept that all man is one; and man cannot injure any part of himself without simultaneously injuring the greater self.

Going back to pre-history, how could man have survived as a species if not for his social and altruistic instincts? Dog-eat-dog is a modern and apologistic concept, a learned behavior built on greed and centuries of the unequal distribution of wealth, with inherited kingships to ensure the continuity of greed.

But behaviors can be unlearned, too, as continuing human sacrifice and some social responsibility programs indicate. Co-responsibility is the inevitable outlook. Meanwhile, there are some persons who will make efforts to help; others who will make efforts to look the other way; and countless more who would gladly help if someone would point the way for them. So there are many ways in which your organization can contribute which would not be outrageously expensive.

If you're engaged in a technical field, you might teach basic skills in a technique that would help you to identify potential

production line (or engineering) personnel...or identify students with enough aptitude in your product/service area to be worth helping along by scholarships.

In locales in which there are poor and unemployed people, there are also under-nourished individuals. A major service can be performed by helping such groups to organize a buyer's club or choose the more nourishing foods available in any given season. This survival topic can be made less blatant by disguising it as a menus or recipe course, with the nutritional information sandwiched in. There's nothing to be gained in adding insult to past injuries of class.

Practical Application:

Considering the size of problems, your programs might have to be considered small and only testing the waters, to begin. Any program can be expanded if properly designed in the beginning. The computer is credited with having turned the tide toward new skills—certainly its arrival in the personal size for desk top or home office has provided an easy dating process or a watershed of change. Pick one. And it has provided a good symbol for the inevitability of change.

Although all of these facets (as outlined in preceding chapters, too) are important to your foundation, these pieces are not themselves the *program elements* that you will be training-for. Actual programs will fall into one of two categories (re: Canton): product/service or public service, each with sub categories. The first major category is the product or service-related instruction for market support(ala computers). Here, you might be dealing with a) the improvement of existing programs or the penetration with adequate (in the training sense of fulfilling needs) programs offered deeper into your own marketing network; or b) the creation of new programs relating to current practices/services; or c) the creation of new programs relating to projected new products or services.

His second category—that of public service—will be discussed at length following. When considering instruction for public or social service, it is irrelevant to *effectiveness* whether the program loses money, breaks even, or (ideally) is plowed back. It is also irrelevant to effectiveness whether the topic(s) or skill(s) being trained-for are related to your products/ services or are totally unrelated to the firm's business activities. It might be desirable that profit be produced or that activities be related, but that is choice, not a challenge to relevancy.

This second category is usually developed to answer felt needs in the immediate or larger community surrounding physical plants and offices. "Adopt-a-school" plans are part of this last group. So are charitable matching-grants. It is important to understand that a program is not necessarily a "social service" simply because it provides for fulfillment of a need beneficial to the public.

Through it all, keep a sense of perspective. Be honest with yourself and others in assessing your realities. Keep in mind that the computer did not close steel plants—mismanagement did or helped...and the computer alone is not going to provide all the jobs needed to put armies of steelworkers back to work.

Automation is a growing option for many firms whose product requires large amounts of repetitious work to assemble. If robots can do the work that scores or thousands of people really hated to do, so much the better for the efficiency of the assembly line. However, workers displaced by those robots do not disappear and should not by default finance corporate change.

Whereas business organizations proudly announced in the Nineteen Fifties that "no one will be laid off as a result of the purchase of the computer, nevertheless normal attrition of the workforce (rather than expansion) was counted on to balance things out. In those days, jobs were aplenty, and anyone who walked away from one employer was assured of placement elsewhere. Today, that's not quite true. Although the doctrine of "at the employer's pleasure" still dominates employment

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situations, the end seems to be approaching. Employees are more adamant even if there were abundant jobs...which there are not yet—despite claims and complaints. Someone will have to train the refuse—government or company. The choice is probably not ours. The training programs might be.

Even though it can be argued that the computer has created more jobs than it has displaced, we have had a corresponding surge in the general population and so in the proportion of unskilled or semi-skilled people who must be trained or retrained. Normal attrition today solves nothing.

Job training and retraining, therefore, will become one of the most important aspects of the changing employment scene. It will also offer perhaps the most easily identifiable and the most easily addressed avenue for your organization's participation. After all if your organization is successful at doing and selling anything at all, it possesses expertise in at least that one area and can offer to share the generic elements of the trade. This can be done by incremental steps in a staircase of ascending complexity that ranges from lending staff tutors to helping existing trade schools to writing books or manuals or how-to texts to conducting classes for the target populations.

No single approach will be right for all organizations, nor even for all offices of the same organization if located in different neighborhoods, towns, or geographical areas. However, both the range of responses and the scope of the need are so vast that if you are genuinely seeking to make a contribution, you cannot fail to find a means. It is irrelevant whether your organization actually hires any (or any significant number) of the persons trained as long as you are helping them to achieve viable skills. It is irrelevant to any but bonus-based thinkers if you cannot show a direct dollar profit from the conduct of training courses if you are helping to reinvigorate the economic base both in terms of skills and employed consumers. The idea of serving the public good needs to be resurrected. What is important is that our nation's wealth is increasingly concentrated and our marginally-prepared citizens are becoming

both greater in numbers and more politically astute. Does it not follow that the nation cannot react with benign neglect or assuage its guilts with clever phases such as "supply side" that those forces invented for the occasion? Trickle down—when?

Change and History:

It is not at all helpful to say we are in a changing age, because change has been the norm throughout all history. However, we are living in a period in which change comes so fast, wave upon wave, that second and third generation product- (and therefore life-) changes are upon us before we have absorbed the first. That's only one of the effects contributing to Future Shock, in the terminology coined by Alvin Tofler.

If change is inevitable, then it is our right (and perhaps our obligation) to help it to lead to something worthwhile—advance. And a generation which is beginning to recognize values beyond money is probably heading in the right direction. Nobody can do it all alone; but little of it will get done unless each of us contributes his share. If your share includes adapting the resources of your organization to make the resources more accessible (what percentage more?) and beneficial (how measured?) to greater numbers of people, do it. If you can contribute to the development of human potential, you are contributing to the long-term good of the nation and the world society.

The student rebellions of the 'Sixties seem to be a thing of the past; the flower children no longer blossom so profusely on the hills of San Francisco. Yet, if we consider that the message that both of the movements brought was one of love and cooperation, we must admit that the social responsibility movement is almost surely an out-growth of the awareness generated throughout the society four decades ago. Moreover, that awareness was generated by people then too young to be cynical and too inexperienced to know how powerful would be

their contribution if only they would give the ideas a chance to root and grow.

Although many consider those "movements" a failure, the only failure was that normal to youth: impetuosity—a demand that the harvest be realized on the day of planting. Consumer protection laws were one of the first (and largely unrecognized) fruits of those movements. Maybe student rebellion isn't all bad—they know how to think! By shaking up their elders and their culture, those gentle people helped to shift attention away from what we *have* and toward what we *are*. That, in turn, has helped to implement the theories of Maslow and Frankl and other social scientists whose early theories helped to legitimatize the concepts those gentle people were attempting to practice. Okay—so "do your own thing (no matter what)" was a misreading of Maslow, but it was their attempt to deal with reality.

Ideas work in cycles. In the past, those cycles often took hundreds of years to progress. Consider the radical nature of the Magna Carta, in which English King John (by Divine Right, it was taught) was forced to concede powers to his nobles. That led first to the English Parliament and then to the American and French revolutions. Fully 550 years from the seed to the flower.

Things move faster today, of course, in part because of a more literate world and national population (someone rebelled against the teachings of kings and churches); in part because of multi-national interests and corporations; and perhaps in large part because satellite communications and the ubiquitous TV set have deprived the world of the luxury and curse of remoteness. Isn't it surprising what far-reaching goals can be attained with patience, perseverance, and seemingly small practical helps, such as helping someone to handle our language or to do his job a little better? It sort of makes you want to pitch in right now, doesn't it?

Use the two forms following as guides to your initial inquiries.

Instructional Program Inventory
(Suggested Memo)

(Date)

Memo

to: All Department Heads

from

RE: Managing Through Training

The Marketing (or your own other) Department is now evaluating the possibility and potentials of increasing instruction programs and seminars for personnel in the Dealer/Distributor channels and/or for the general public, offered as a public service.

We have no particular programs in mind at this time. So this basic first step is to determine what's available now that might be used either directly or as a resource for other possible specially-developed programs. Any valid learning topic in any of the three learning domains (knowledge skills, dexterity skills, or attitude adjustment) will be considered; and anything that improves trainee competence (from janitorial or assembly line operation to secretarial skills to product training) could be useful.

Therefore, we're asking you to list everything that exists in your Department now. Furnish only the minimal details asked for here. We will call later for the Syllabus, Complete Statement of Objectives, and/or verbatim scripts for any of those programs that ultimately become candidates for further consideration. Any help you can give the incipient project now will be much appreciated.

I suggest a program on this topic for these reasons:

---

1. The following programs are operating now and might be usable without restriction:

Title   Subject Matter   Objective/purpose   Available?

2. The following programs are usable only with substantial editing or revisions because of idiosyncracies of our (other) organization:

Title   Subject Matter   Objective/purpose   Available?

3. The following programs are operating now but contain proprietary information that must/should be protected or removed:

Title   Subject Matter   Objective/purpose   Available?

4. The following programs are out of date but might contain elements that might be valuable:

Title   Subject Matter   Objective/purpose   Available?

5. This remaining material still has potential as a resource for outsiders:

Title   Subject Matter   Objective/purpose   Available?

6. However, I believe that the company's management/marketing interests would be served by creating a program on this topic for these reasons:

Please return by (date) to

Name _____ Dept: _____

Location: _____ Phone: _____

Opportunities Correlator

Identified Needs or Opportunities
(from Project Analysis Forms)
Link with TRAINING PROGRAMS IN INVENTORY

1.) Marketing/Distribution Channels	Matching Elements	Progr Title	Dept	Time/ Hours

2.) Public/Civic Service:

Window A:

a)
b)
c)

Window B:

a)
b)
c)

Window C:

a)
b)
c)

3.) Other potential projects not on original Project Analysis forms but newly recognized from Inventory Resources:

4.) Identified Needs for which ready resources are not apparent:

NOTE: Explore the most-likely matches without overlooking any interesting or important areas that can be reached only by special effort.

Chapter 10

Organizing Early Ideas

Now that the glaring generalities have been covered and numerous specific suggestions have been paraded, it's time to turn to preliminary investigations of the types of programs that might benefit your company.

There are three main ways of approaching this preliminary organization process. The first activity to occur to most people is the inventory and analysis of existing programs and materials. That's a perfectly valid and logical part of the overall...but it's not a good starting point, because the very fact of your *analyzing* what already exists tends to restrict your thinking about the nature and extent of what might be available opportunities.

The second, and better main way, is to start free-thinking about your needs first without being overly concerned about restrictions of budget or calendar or personnel. This activity can be thought of as the cousin of brainstorming, if you know that idea-raising technique. Brainstorming, if you're not familiar with it, deals with the volume of new ideas that are generated in a mix-or-match-or-hitchhike atmosphere. No critical judgments can be made while the brainstorming session is in progress. A usable idea might or might not fall out. It's not that existing constrictive factors are *never* to be weighed, but merely that they should not become *inhibiting* factors from the start. Apply a practical filter afterwards, in private.

So starting in the free-thinking mode is better than starting with an analysis of existing materials, and ultimately you will do both. In fact, you should do both, on the condition that the sequence is right. Moreover, you will surely do the analytical work, since that is a structured part of the ISD process.

The third of the three main modes is problem-solving. It, too, bends to somewhat "correct" procedures, and those will be presented here.

Creativity and Its Cousins:

If ever anyone captures *creativity* in either definition or laboratory, that person should be able to sell limitless bottles to industry, which still insists on looking in the unlikeliest places for great gobs of it. Aided by the supercilious interpretations of comments regarding creativity in *Thriving on Chaos*, by Thomas J. Peters, companies are going about creating chaos (in the sense of madness) in hopes of creating the raw matter of creativity. Chaos is conducive mostly to further chaos. Creative genius can often flourish during chaos, but the creative gift is the ability to make order and sense out of surrounding chaos—despite chaos! To create chaos to see whether creativity exists is silly. Allow whatever creativity might exist to make itself known—there's a far better chance of doing something worthwhile. Creative people can often ignore madness-chaos by concentrating. Chaos itself is not an ingredient of creativity, although defeating chaos probably is! The author wrote little about the topic. What Peters apparently failed to see is that creativity cannot be "managed" by traditional business methods. But asking Management consultants to understand non-management is to ask a fish to explain the non-water flight of birds.

Exactly What Is Creativity?

The closest that science has come to defining creativity is to say that it is the recognition of new relationships between two pre-existing concepts, so as to produce a third new insight. By necessity, that definition is inquisitive and reflective. Often it is characterized by flashes of insight. Management can *accommodate* but cannot say "shall" or even "may" to that process. Problem-solving has been advanced by psychologists as the most creative of all endeavors. Even this view is in question today via some questionable logic. That didn't hurt McLuhan, of course.

Nevertheless, it has been established that creative people and geniuses can function under chaotic conditions—essentially (we believe) by ignoring it. Chaos might be simply defined as a condition lacking understood relationships. That sense is everywhere and needn't be "created" in order to be enjoyed! After all, lightning and even the entire planetary system were once thought to be chaotic, but ceased to be so after the creative insight; now we admire the correlations. Those "chaotic" elements haven't changed—we've changed our viewpoint. These concepts were *fought* by their societies when first advanced, by the way. Conventional wisdom was the enemy then and often still is.

So the application of critical analysis and thinking to the problem at hand must be considered. If it's successful in solving the problem at hand, it's a highly creative process.

Invention is a type of original problem solving done with tangible or otherwise physical objects. *Innovation* means simply to "make new"; a slight but noticeable change from an existing model can qualify. If a cook adds raisins to one pound cake and nuts to another, each is an innovation on the original pound cake recipe, not the creative act of cookery represented by developing an essentially new recipe for a basic pound cake.

Similarly, brainstorming is not truly creative because it does not address the problem directly while generating ideas. What it contributes to any problem solving process is freedom from the too-early inhibiting influences of critical judgment.

It's obvious that things that are merely unusual or even freakish are not necessarily creative—they can be simply clever or interesting. But these fine points are crucial not only to your understanding the differences in approach, but they can affect your results, too.

Because your marketing projects are in the realm of ideas, you might best approach them as a problem solving exercise. Review the accompanying Problem Solving Outline before attempting to compile a list of projects. Once clear on problem

solving procedure, you'll find the project analyses easier to negotiate.

PROBLEM SOLVING OUTLINE

I. Define the problem

   A   If problem is fully understood now, state explicitly or quantitatively.

   B   If not fully understood now:

      1. list all untoward or suspicious events/circumstances, etc, which are known (or thought) to impinge on the problem area(s).

      2. if the main problem seems to be made up of several interrelated problems, break out each on a separate path before continuing.

      3. list other events/circumstances/curious relationships not yet fully explained that might be part of the problem.

      4. condense and/or combine these lists:

         a) grouping like items

         b) seeking new relationships not previously understood

II. Define the solution

   A   Stipulate the "solution criteria"; those conditions to be fulfilled before the problem is considered <u>solved</u>.

   B   Partial solutions: Acceptable? Under what conditions?

   C   Be certain new solution will not create new problems.

III. Begin creative analysis process.

   A   Examine each group/item/condensed item

      1. break out each area into logical components

      2. break out each component into smaller elements

      3. continue breakouts until each smallest practical problem element is identified

---

B   Examine the break-outs and determine

1. is any of these a clear cause of problem?
2. are any groups likely to be the cause?
3. would any element's resolution result in a partial, useful solution?
4. If none, seek further relationships.

C   If several "solutions" present themselves simultaneously, list all. (Some managers choose to brainstorm at this point and within context.)

1. be inventive; reach; what if?
2. accept and do not ridicule <u>far-fetched</u> suggestions, but subject them immediately to criteria established.

IV. Recognize solutions (at any point in the process)

A   When any possible solutions pass preliminary critiques, examine fully, regarding criteria of II A, B, and C.
B   If two or more possibilities pass criteria, select the least complex/most practical/most advantageous, according to need.
C   Announce the best and run with it

1. Announce new policy/procedures
2. Commit: which attitudes/habits, skills are affected? How to re-educate or retrain?
3. Create any needed support/tools

V. Plan for re-examination and feed-back

D   Is the problem really solved? If not, recycle.
E   Have any new problems been created? If so, recycle, using new data.
F   Can further improvements be made after trial period?

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Chapter 11

Two Main Modes of Focus

Programs for the general public and your channels for marketing chain/distribution network should be separated. When thinking about programs for the general public, the focus is on opportunity and calls for insight and luck as well as topical expertise. Therefore, we'll treat the public service focus separately from problem-solving in general.

Problem-Solving Mode:

If you select two or three significant marketing problems as your introduction to the process, then your "programming" interests would tend to coalesce around potential solutions. The ISD process is nothing if not logical.

The free-thinking mode takes into consideration your possible dealings with individuals whom you cannot <u>assign</u> to the program; who need not perform competently if they choose not to, since they don't report to you; whom you cannot even approach without first selling *their* managers. So selling the program to market/distribution channels is part of the later detail work and need not clutter early thinking unless you expect major opposition up front. You really can't sell *nothing*.

Now, with the details and clutter put aside for the moment, what types of approaches (not necessarily specific solutions) might help solve the significant problems? How could that be potential solution be taught to the outside personnel? Do your internal staff—especially those who must interface with the distribution personnel—have a superior knowledge already, or are inside people likely to need the same type of training? Who should conduct training sessions? Should it be you and/or other marketing home office managers, or the individual salespersons?

Third parties? Experts expounding in person or on video or computer disk?

If the trainers for your contemplated program are not already skilled in platform techniques, then trainer-training must be part of the programming process for the internal staff. The US military has long ago proved that it's easier to teach platform skills to subject matter experts than to teach subject matter to skilled platform artists. So plan to begin with knowledgeable people!

In providing for logical trains of thought, let yourself be guided by good problem solving techniques. A generic outline was provided earlier in this chapter. Keep in mind that if solving a problem looks good from your viewpoint, it should also look good from the other side; otherwise, why should anyone want to implement it? Do not expect people to contribute to your benefit without getting something in return. In training, that concept is called WIIFME: What's In It For Me?

Within the distribution channels, you can generally count on higher volume or increased profits to stimulate interest. However, so many unfounded claims are passed around at order time that most dealers and distributors are probably quite wary. If they have a choice, expect them to exercise it. And expect them to exercise it against you if you cannot back up your claims with examples and statistics. Moreover, attitudes on the receiving end are not always perfect: at a role playing session of salespersons, when a salesman said, "I'd like to discuss our new program," the client role player answered, "Fine, take me to lunch!" The entire room broke up with knowing laughter.

On the other hand, your distribution channel firms have problems, too, and it's likely that some, if not most, are somewhat related to either your own problems or to generic sales problems—plain old knowhow seems to be in short supply, no matter how long the basics have been around.

So it's likely that if you contact some of the people you are hoping to help, they might have some pretty good ideas about what they need. If you were paying of lot of money for that

direct contact, it would be called market research. Snobbery can be expensive.

Refer to the accompanying Preliminary Project Analysis Guide (Marketing/Distribution Channels) to start your planning.

Civic/Community/Social Service; Needs Mode:

All of the ideas regarding public education (adult paid instruction, such as computer how-to sessions or cooking/nutrition classes) and corporate or professional responsibility topics, etc., already discussed in preceding chapters, need to be brought into your thinking.

Public interest topics are not always problem-oriented, although problems provide easy focus points. Policies, issues, and civic projects are legitimate adjuncts to civic needs. Numerous companies have already co-sponsored free music concerts, theatre, and entertainment events for the poor or young non-payers. That's certainly not new, but usually welcome. (Remember tobacco?) Since the possibilities are so varied and the potential project horizon so vast, it's probably necessary to narrow your thinking for the purposes of making the task manageable. Take one "window" at a time—nothing prevents your peering through several windows in succession. That is, without examining every prospect for charity in the world, you can explore the prospects for a food kitchen or a winter coat giveaway.

Tellingly, even athletes sponsor public service programs these days. If your company doesn't, is something wrong with your company's outlook?

The easiest and perhaps most logical way of approaching any problem, given what we must suppose to be less than unlimited resources, is to decide whether you wish to conduct the program in only one or a few locales (such as neighborhoods or small towns in which your offices and plants are located) or

speak to the entire city or metropolitan area(s) in which you do business and/or to the entire national market.

A neighborhood bank, for instance, might deal exclusively with its business district; but a major bank that issues credit cards nationally must deal with all its cardholders equally, regardless of the geography but respecting local state laws. Similarly a soft drinks bottler must deal either with its plant surroundings and employees or take on the entire metropolitan area it serves—which could be prohibitive. So accept reasonable limits to your ambitions.

Firms that advertise nationally can choose between doing something major and (for its size) relatively substantial and expensive in its few plant locales or else doing something relatively shallow (at equal expense) over a larger regional area or even the entire country.

The important thing to keep in mind about public service projects is that what looks to be a horrendous task, with absolutely no starting point, becomes quite easy to deal with if you select a couple of logical windows and then proceed to dissect and survey the landscape from one or more windows in turn. Avoid nebulous situations. Welcome practical problems.

Keep in mind also, as you make the first rough work-up of ideas, that you should not attempt to finalize any of the ideas at this point. That would be premature, given the intent of this book to help you to deepen and broaden your understanding of what's *possible* via the training discipline.

Also keep in mind that you might find both marketing and public service types of projects to be equally valid for your organization; and combined or cooperative programs might be possible or desirable. Internal politics could become a factor. If only public service types of projects would result, you might or might not want to supervise or be involved beyond the initial idea stage. For skills training, look to your authorities/experts. That, too, is a decision that can best be made after you have mastered the concepts presented in this book.

In recent years, the Public Affairs/Community Relations office of many companies and associations has been transformed from a backwater of the public relations office to an independently administered and budgeted department. This reflects the current public expectation that corporations take the public good into consideration when planning major new projects that will affect the community in any significant way beyond providing new jobs.

Since "significant effect" these days includes anything from parking problems to obstruction of skyline to potential pollution to general ecology, the Public Affairs Office of your organization, if you have one, will tend to be aware of both a) public and government or civic channels and b) established programs and their recognized leaders.

As a result, the Public Affairs Office can be one of your most logical resources in choosing programs. That can be both an advantage and a disadvantage. The advantages should be evident. The disadvantages, however, spring from exactly the same roots: knowing where the power lies, corporate officials (among others) sometimes overlook other avenues or underestimate the value of untried alternatives.

There is the further caveat that everything that glistens is not gold: groups claiming to be charitable might have no measurable connection to their touted "charity." Check it out.

So even if you feel that the program(s) you contemplate might be best turned over to others for development and/or implementation, pursue you own thought processes (in the manner outlined in the balance of the book) until you yourself have greater perspective on the problems and opportunities. When you are firmly grounded, then it's safe to submit grounded ideas to staff action, if appropriate.

Although brainstorming and other committee actions will be needed from time to time in the development of this program (as with any other of consequence), creative thinking *per se* is not a committee process.

Develop your ideas (distinct from the formal program plan) until you are able to discuss them in some detail. Then you will be best prepared to present and defend, to elicit any suggestions, and to win support for full-scale development of a pilot program. The pilot will succeed or fail on its own merits—with the least interference from internal politics if various offices have been involved early in the process.

What better chance could you ask of a plan?

Your program inventory will consist of both your organization's established programs and the potential for programs based on staff expertise.

Getting a list of programs already being conducted on a regular basis by staff or line department should be quite uncomplicated but very valuable. A memo to the sales training director, plant technical training director, and the Personnel/Human Resources department should net the lists you need. If the programs have not been developed according to ISD methods that have been detailed in these chapters, then each program's description should be phrased as a Complete Statement of Objectives. That will tell you everything you need to know on a cursory basis. Existing programs can be (but are not necessarily) helpful, and not at this point—they're only inventory, here. Each CSO should state *in an action verb* with modifiers what the trainee will be able to do under what conditions and to what level of accomplishment when he demonstrates his competence. Testing procedures and passing grades must be unequivocal. The use of "more," "better," and "increased," and other subjective terms is counter-productive and not permitted by ISD. How much better, in percent or objective terms, should performance be?

If the descriptions of training programs you receive are not prepared in CSO form or do not present the needed information in some easy-to-reference manner, then adjustments might need to be made in the descriptions and possibly in the programs themselves. Inadequacies of programs are quickly exposed by ISD methodology.

Succeeding chapters will help you to determine exactly what you should be seeking and how to evaluate findings. For the moment, we will work with the generic sense of inventorying established programs.

In addition to the established programs, there is surely an abundance of knowledge and idle information that could be turned to program purposes any time a new use is identified.

Which sources of expertise you draw upon and which interpretations of that material you use depends on the nature of the program, of course...so you will need to have a fairly complete idea of *what you want to accomplish* before making broad inquiries about methods and sources. Preparation helps to avoid unfounded criticisms from on-lookers.

That, in effect, becomes your own statement of purpose or objectives (not yet "complete") and will drive the mechanics of formulating a direction and creating the program that achieves that direction's intent.

Nevertheless, having a list of programs already operated or operating in each staff or line function gives you the raw material you need to being to assess, in general terms, and at the appropriate time, the extent of borrowed material relative to the absolutely new material needed to fulfill some of the program ideas conceived in this chapter's Preliminary Project Analyses form, as best applies.

You can write your memo requesting such lists anytime after you have read through the balance of this and the succeeding chapters but you should not attempt to evaluate those lists received until after you have covered the balance of these chapters plus any ISD material.

Preliminary Project Analysis
Marketing Chain/Distribution Network.
Product/Service Mode

1. List known significant problems related to our marketing/ distribution channels:

   ➢ from the organization's viewpoint:
   ➢ from the Market's/Distributor's viewpoint:

2. Sort out complex or inter-related problem areas into individual problems, using the accompanying Problem Solving Guide.

3. Key problem(s) to be further analyzed here (make a separate sheet for each key problem to be considered):

   WITHOUT ATTEMPTING TO PROVIDE SPECIFIC SOLUTIONS NOW, OUTLINE:

4. Likely approach(es) to solution, if evident now:

5. Experts on problem, if any, to be consulted; name(s).

   ➢ among our organization's staff:
   ➢ among our Market/Distributor's staff:
   ➢ among proved "outside" sources:

6. Who (by function) are currently affected by this problem?

   ➢ among our organization's staff:
   ➢ among Market/Distributor's staff:
   ➢ among proved "outside" sources:

7. To whom does given function/level report?

> - in our organization?
> - among Market/Distributor staffs?
> - among "outside" sources, if any?

8. Other functions/levels indirectly affected:

> - in our organization
> - in Market/Distributor channels:
> - elsewhere?

9. Approximately how many individuals are affected

> - in our organization: primary level (); other levels();
>   stipulate
> - in Market's/Distributor's channels?   local (); area);
>   national ()?
> - elsewhere.

10. What human/efficiency/values/dollars or other returns
     would be realized from a solution to this problem?

11. Considering our existing Training Department
     capabilities, could a program of this magnitude
     be accommodated inside? Why or why not?

12. What time frame would be realistic:

> - to train all staff affected?
> - to amortize or recover program costs? to reach optimum
>   number of people and levels?

READER: DO NOT ATTEMPT TO FINALIZE YOUR
THINKING AT THIS TIME.

Preliminary Project Analysis

Community/Social Service/Civic Affairs.
Needs Mode

1. Given our organization's scope and budgets, our (pilot) (reporting/operations) program(s) should:

Ops	Pilot	Focus	
____	____	____	a) limit to our employees only
____	____	____	b) encompass entire town/metro area/state
____	____	____	c) encompass (target group) (general public) in (our) (their) office/plant/neighborhood
____	____	____	d) project nationwide if pilot succeeds;
____	____	____	e) other: (stipulate)

2. Windows to be used when viewing community/social service landscape:

Cause _____ Nature of Opportunity _____

➤ public education
➤ ethnic and minority
➤ or underprivileged
➤ or language/literacy handicapped
➤ or established/announced civic/social projects
➤ (client) (company)-paid personal-interest lessons
➤ entertainments and sports
➤ other: (stipulate)

3. Significant public interest problems/policies/issues and/or funding/grant opportunities that would seem to fit the strictures above (stipulate:

4. Estimated numbers of people encountered in each window selected above:

---

5. Economic value of completed program expressed as an achievement of (any or all):

➢   (Marketing (advertising, sales, sales promotion, sales training, public relations, etc.);
➢   Public/civic affairs;
➢   Community/social services;
➢   Public relations (specific objective);
➢   Goodwill (preferable specific objective);
➢   Other:

6. On initial appraisal, it appears that a workable pilot program:

➢   can/should be developed as a Marketing project;
➢   can/should be developed as a cooperative project with _____
➢   should be turned over for development to _____
➢   should be implemented after pilot by _____.

7. Funding for the type of project(s) anticipated in Items 1 & 3 above can/cannot be appropriated with current (budgets) (policies) for appropriate elements of Items 5 & 6 above, because:

Staff members who might have expertise/experience /interest in these areas, by name:

8. Ideal time frame to realize major Marketing objectives:

Project	Purpose	Date
_____	_____	_____
_____	_____	_____
_____	_____	_____

READER: DO NOT ATTEMPT TO FINALIZE YOUR THINKING AT THIS TIME!

Chapter 12

If You Borrow

The two in Chapter 9 Instructional Program Inventory Guides should aid you in determining where the resources might lie and what can be done effectively with them.

What should you be looking for in those lists of programs that are returned as a result of your inquiries? You should be looking for any existing or potential matches between the types of programs described in your Project Analysis forms (for either or both channels and public uses) and the programs already in existence. New needs? Exact matches are highly unlikely!

Finding a close match will be the most helpful situation, of course; but it might also be asking for the moon. While there might seem to be several relatively good matches on first appraisal, don't get overly enthusiastic yet. It's likely that at least some of the easy match between what the organizations could teach and what the channels or public might like to know involve proprietary information and cannot be compromised.

On the other hand, much generic information is woven between the cables of proprietary information—and with judicious pruning and editing, the established program might lend itself either directly to a pilot program or to the formation of a building block for a related "outside" program. Failing any matches whatsoever, you still have your choice of creating a program that exactly corresponds to observed needs or simply of making a contribution in funding or staff effort to announced civic projects.

To summarize, your overall job when organizing your ideas is to correlate the relevant training concepts (especially learning domains) outlined in Chapter Seven with the most likely ideas produced by Chapter Eleven's Project Analysis forms and Twelve's Program Inventory. While we must admit of possible failure through human error, such an outcome is highly unlikely.

Relatively soon after you begin to review the Project Analysis forms against your Program inventory (what's needed vs. what's available) you will begin to develop new insights on both the company's internal capabilities and its ready potential for exterior actions.

Even without having done the detail work that must follow, you will have begun to realize the effects of the creative insights this problem-solving approach has delivered. In other words, the first results will be visible.

And the best results still lie ahead! To aid you in your review of options and resources, use the following forms in concept, even if not in totality:

The preceding forms should take you where you need to go in the Analyzing and Selecting process or possibly borrowing. Nevertheless, some caveats seem to be in order for several reasons:

a. There's often a rush to completion caused by last-minute pressures to "do" a new program fast. That's destructive thinking, even if common. All the facets of the initial analysis phase are extremely important, whether or not you're already using ISD: if you don't know what the real problem (or opportunity) is, how can you meet it properly?...ie, solve (or exploit) it? Don't jump at quick and easy answers.

b. If you are (even unconsciously) seeking shortcuts to programming, then you are more likely to clutch an old, existing program that doesn't truly fit the need. After all, the old program was designed to solve a different problem—not this problem. Or you might fail to take advantage of a different opportunity—not what this one once was! Therefore, any potentially borrowed program is suspect to begin with. Yes, old stuff can still hold clues to new solutions or useful approaches. That's

helpful even when you don't attempt to preserve every old word! But don't use old programs as a crutch!

c. Be especially careful not to construct a new program that is essentially a re-use of the old ideas and programs dressed up in new formats. This common response of amateurs is always a disaster eager to happen—just give it an opportunity to take over at your shop, and you'll be history around there! That resulting suspicion toward all old materials is not ours alone. ISD specifically instructs its practitioners to collect early and evaluate late—after you've already decided on the needed response! After having determined the actual needs, then(and only then) can you properly evaluate old stuff and choose to use or discard. Wise evaluation can hold the key to success of your incipient program. Remember always: you need to measure results. So be hard-nosed. And be successful. Provably!

Chapter 13

Thinking "Programs"

Once your list of needs and resources begins to recombine naturally inside your head, you'll need to start thinking about the unavoidable (and constructive) next steps:

a. creating an on-paper description of the usable candidate idea(s);
b. converting the idea(s) to programmatic format for approvals and funding;
c. supervising the design and development of the most-likely (unapproved, unfunded) project(s);
d. implementing the course work so designed and developed; and
e. implementing the larger marketing or civic or (   ) plan.

Fortunately for our time and sanity, these are somewhat overlapping or simultaneous activities, and one decision can often serve several purposes. That aids the integration of the overall project(s), as well.

It's clear that the word *program* can have two legitimate and distinct meanings: the course work content and the larger marketing plan that contains it. You will be concerned/involved with both to various degrees, even if you delegate the details. We will assume for purposes of simplification in writing that you, yourself, can handle all the significant details.

This chapter will help you to convert all the useful ideas into a structured program format for staffing purposes. Then you or your CAPABLE program associate(s) working in tandem can and will examine the five key phases of ISD (Plus offering additional information on media cost-effective analysis) so you'll know exactly how to convert ISD theory into controlled development of the program. Finally, expect ISD methodology

itself to give you insights on the overall implementation and continuing management of the program(s) you set in motion. Serious thinking starts with the program outline.

Roughing Out a Program:

Any *program* of this nature is merely a *system* for presenting the given information; in the training genre, the program also includes the tests required for the trainee to demonstrate competence.

While there is no "correct" program format in the abstract, it's become customary to express programs in outline form, using either Roman Numeral outlining (that most of us learned in high school) or the decimal outlining favored by engineers and governmental agencies. Their function is identical.

Generally the skeletal outline of the overall content is called the Master Syllabus. The syllabus becomes the master control diagram for the entire operation. The syllabus for a four year high school program would outline all subjects/courses to be covered in those years. If cursory, the outline could call each year an A or B or C or D under an administrative Roman numeral. If it's more detailed, it could start I-A-I with each year. Again the end result is identical: control!

The syllabus for the graduating high school class would repeat the generalities and add fine points on the topics or subjects to be covered during the year—by title and/or brief description. The individual topics/subjects would be outlined in far greater detail in lesson plans. (Lesson plans can also be in a different outline form.) Since any given lesson (which is content related) could be accomplished in exactly one, or less than one, or more than one session, there will also be a session plan—that is, what we will do *this hour* or *this day.* In short, the session plan relates the information to a do-able time frame.

How many sessions to complete your program? Consider that you were probably exposed to the French or German or Latin languages in full during the first few days of class, but you

mastered only a small part during the entire first year and new parts in subsequent years until you knew the whole well. That first exposure might have hinted at your total program structure, but usually programs are shorter, accomplishing a minor business good more quickly whether or not fully exposed up front. In a company sales training context, for instance, everything that will be taught to a new hire before being sent into the field would be reflected by job title in the job syllabus for "New Hire Sales Training" program. Call it what you will, but that syllabus would/should be adequate to permit all persons who are thoroughly familiar with the subject matter of the given program to discuss in "shorthand letters" any portion or the whole of the given program. They could discuss its components and discuss variations and changes in context, etc. But the same outline might not convey much information to those unfamiliar with the content of "New Hire Sales Training," and their conversations could be more labored, whether or not politically expedient.

Therefore, each subject area would be expanded in a course syllabus that would present a Complete Statement of Objectives (ala ISD quality) for the entire course. Courses for salesmen, for instance, might include Company Orientation; Product Orientation; Sales Policies & Procedures; Product Familiarization, including demonstrations and practice; and A Structured Sales Call. There would be a detailed outline within each topic. The Roman Numeral outline could begin with I-A-1 five times (representing five different titles) or one outline could run I-A-1 through V-A-1 plus administrative explanations. Such details are extraneous to the main concern: content!

Notice that each separate course above would have its own Complete Statement of Objectives (CSO); and all the courses together would create the company's New Hire program. Any person who is familiar with your company could understand the training program merely from reading the (Master Syllabus) outline. On that basis, top management should be more amenable to your funding requests than when buying blind.

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As previously discussed, the CSO must include *all* of the following three categories of information: 1) A specific statement (in an action verb) of what the learner will be doing when demonstrating competence; 2) Under what conditions or constraints; and 3) To what given level of accomplishment, whether perfection or a lesser stipulated but acceptable achievement. Nothing less than those three is *complete.*

If the lesser achievement is not itself adequate for proper job performance, then augmentation training is required; if needed, augmentation should be provided for in the overall program. This is especially important if the program is so complex that it is not likely that most people will pass the first time. Consider the medical or bar professional knowledge exams and their initial failure rates. Another wise action would be to distribute such a program into sections, with less complex, interim tests; so failing students are identified before they burn up more time and money resources.

Determining what the trainee must be able to *do* on completion of the program is a common sense judgment made by the subject matter experts. Developing a valid test of that new ability could be easy or extremely difficult, depending on the nature of the new learning task.

Similarly the conditions established for the test (demonstration of competence) must be fair and consistently applied to all trainees; coaching will or will not be provided (you decide); and all cases of requests for assistance will be handled in the same way with the same merits or demerits, if any. That, too, is common sense.

But the determination of trained-for proficiency is not quite so easy. It seems to be common for individuals to score well on practical or classroom tests but to fail on the job in the field. Usually you can blame a lack of class practice. It seems to be equally common for someone to perform hesitantly in the classroom but to "get the hang of operations" in the field. That's normal in all of life: strike a balance.

Such variations reflect human variations, of course; but for safety, each individual should be able to demonstrate capability on a test that has been validated by competent performers of the job. If you don't read *Common Sense ISD*, plan to discuss ISD in greater detail with specialists because the ISD method assumes a test to be valid if all persons already competent in that skill can perform it properly/perfectly. If they can't, the test is probably too hard. If the test doesn't cover all needed task/element skills, will the persons newly hired be inadequate for the larger job? Determine now!

What matters thereafter is the one category, among three, of training proficiency that should be required for each course and its multiple lessons. The three most common levels of training proficiency (or skill) levels (as presented in Chapter 8) are:

1) Absolute mastery of the problem/training task; no coaching is permitted during testing, and no errors are allowed. "It's brain surgery, and I'm a specialist!"

2) Practical command of the problem/training task using references and documents commonly available in the field; coaching can be permitted in the classroom (to a stated degree) if the trainee would be permitted to seek advice by phone or personal inquiry while on the actual job. "This signal is not responding—what should I do?"

3) Familiarity with the topic for discussion or diagnostic purposes; other persons will solve the problems and do the actual work. "The drain is clogged; send a plumber."

Generally, a familiarity with the topic that's consistent with levels 2 or 3 above will suffice for general channels even when level 1 is required for your staff or other specialists. For the general public, of course, unless technical training is precisely the nature of the given course, level 3 often suffices. Adequacy (not a dirty word) is sufficient.

By contrast, professional courses (for instance, sponsorship of a course for the health care community) might require training

of the highest level of intensity for those teacher/professionals and also permit a public-awareness program simultaneously at the lowest level of intensity. What do you intend to achieve?

Estimating Time Frames:

Once you have accurately assessed your program as belonging to the cognitive or dexterity or affective domain and have also selected the appropriate proficiency levels for that training, you should be able to make a preliminary estimate of the amount of training time that might be required for students to achieve the given level of proficiency from a given starting point (or initial proficiency/grade level).

Keep in mind that the amount of training class time could be a few hours or weeks, while the development time to construct a program of that length will be considerably longer. Training professionals often estimate one hour's program time as output for one week's office development work, plus handouts production time. The latter could be lengthy but can be done in segments.

Such a time estimate permits the development of a workable, acceptable syllabus (Roman Numeral outline of the topic/course). If the syllabus is not yet even partially developed (or if a substantial amount of research needs to be done), the development time could be stretched considerably. Library time can be construed as development hours, even if there's no direct product: "No information is available on that topic."

At the end of a series of week-per-hour scheduling (some telescoping occurs on one-week-or-longer programs), you will have in your hand the master typescript for the program, including workshop sessions and all other handout materials that are edited versions of the script. Generally the lectern/lecture script constitutes 40 minutes of each hour, and the workshop sessions, the remaining 20 minutes. This, too is a rule of thumb; and in a long program which need not be modularized for

mechanical or clock reasons, the individual lesson or session plans will vary in length, according to need.

When planning workshops and handouts, keep in mind that you could require each program developer to memorize the entire Encyclopedia Britannica as preparation, but that would not fall within the normal scope of one-week's logical assignment for anyone.

As you will find in using ISD, a complete lesson plan includes all six of some essential components:

1) A course introduction;
2) A list of presentation and support materials;
3) Applications of the principles (examples);
4) A summary of the lesson learned;
5) Evaluation criteria.
6) Working calendar, including session breakouts.

Even the best-prepared CSO's and lesson/session plans reflect past evaluations of needs; and needs change. Therefore, however correct the original material is in content and style today, it could still be lacking to some degree when used tomorrow. Never assume that anything carried forward is valuable until you have examined it.

That could be true not only of material at hand but for your future needs, whether or not known. Projections are rarely exact or followed, even if endorsed early. Be flexible. Keep in mind that change is one of the reasons that a third party (possibly a consultant) opinion is sought at regular intervals.

The most efficient program you can construct with the ISD methodology reflected here will assign exactly the needed amount of time required for all (or the agreed percentage of) learners to demonstrate proficiency to the stipulated level of intensity.

Correlating classroom knowledge (written) or performance (dexterity) tests with later field performance of individuals will provide the statistical base to guide the continuing evaluation of

the program and yield firm data by which to critique and refine the program components and design.

As you begin this study section, keep in mind two cardinal principles:

1) Although presented sequentially as related ideas in this book (a legacy of the linear language), ISD is actually a concept. Therefore ISD's five phases are as much interactive and interdependent as sequential. Constant cross-referencing and adjustment (called iterative development) are essential.

2) Never cheat! So much detail work is evident in the requirements of the process that neophytes are tempted to cut corners, to adjust what's readily available rather than to analyze (and compose) anew. If you do that, disaster lies in wait because there's no way to know which shortcut(s) hold the error. Correction will consequently become virtually impossible, and tinkering will become the norm. That's probably what's wrong with other programs now, if you think about it. Don't debase ISD that way!

The second principle above speaks for itself, but the first deserves some expansion. When you learned to ride a bicycle, did you first learn to balance and then how to peddle and then how to steer? Obviously such things can be discussed in print only sequentially, but the process of riding requires that all those elements be implemented together, or you won't go anywhere. The point of conceptual breakthrough probably occurred when you realized that moderate speed helped you to keep your balance even though it exacerbated the bruises when you spilled. You're supposed to do it all at once. And once you gained that insight, how long was it until "Look, Mom; no hands!"? Go thou and do likewise in training others for complex tasks. Programmed Learning might help you to understand the actions

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separately, but they work only together in actuality. Teach the needed conceptual skills as concepts!

Some of the ISD process is indeed sequential. Obviously you cannot evaluate a presented program before it has been implemented; and before that, not before the program parts have been produced; and before that, not before the program has been developed; and not before it has been designed; and all that not before the underlying objective (job) has been examined. So what's the conceptual problem? It's a whole!

Cost-effectiveness. In many instances there are several ways to accomplish a training objective. There is no sense in creating a program that requires an elaborate setting if you can't afford the setting. Depending on the expected numbers, with most general knowledge, you can send key people outside for training or else hire only those who already have the requisite skills. Salary costs, although higher for the latter, might still be significantly lower than the financing and amortization of an elaborate but little-used training setting established within the company.

In simpler circumstances, you might be choosing between live demonstrations and A/V modules, including slides, film, and video. The number of students, repetitions, locations, etc., would help you to analyze. The cost/effective calculations would have to be done relatively early in the process to help you make sound decisions and avoid blind-alley planning. Yet we present the cost/effective calculations separately in ISD following the five phases, because it does not "belong" anywhere and yet influences decisions almost everywhere in the later tasks.

To get the most out of this book, read all of the following chapters before attempting to convert any of the information or operations to action in your anticipated project. You might want to read through again, this time jumping around to tie together the key elements of costing with initial estimates that might occur in actual ISD Phase I (Analyze) and the more intensive cost appraisals germane to ISD Phase III (Develop). If you choose to proceed, you should find everything needed in full and

clear discussion with how-to forms and examples in the book *Common Sense ISD: Instructional Systems Development for Non-Trainer Managers in Small and Mid-Size Business*...available in early 2002.

ISD is complex (as in bicycle riding or typing) but not difficult once you get the hang of it. Yes, it's always somewhat time-consuming. But it's accurate and guaranteed! So let it work for you.

There's no more difference between budgeting for ISD's mediation, setting, and personnel requirements than there is for the annual budgeting operation for your department or for the introduction of a new product: it's simply detail oriented, and the quality of the input will determine the quality of the output. GIGO—remember?

ISD will work wonders for you if only you give it a helping hand, as this book presents the basics, and as the companion book details.

Chapter 14

Selecting Project Staff:

If you come away from the specialist's own discussion of ISD with the understanding that the rigid derivation of training and its tests from the job or task to be trained-for makes perfect sense, then you have grasped the overriding concept of developing competent training.   No one needs excess job knowledge except if being considered for promotion.   Deliver more information and training at that time, if and when needed.

As a prime benefit, you will be able to judge every proposal made by any person in terms of its *validity* as a program element: that is, how directly it reflects the part or whole of any job(s) the trainee must ultimately do.   ISD will yield proof of job competency for each person via valid test or demonstration. Skillful fly fishing does not prove prowess in tennis.

There should be no hocus-pocus in the ISD approach to training; and there should be no room in your program development plan for any con-artist who mascarades as a *medium* for revelation and Devine inspiration of his programs. Competent trainers expect to prove the direct derivation of training requirements from the job itself. Failure to do that is probably the mark of incompetence among training personnel, regardless of job histories or training system used, and it should be handled accordingly. Implementation of ISD has resulted in the transfer or other replacement of an incompetent training chief more than once because ISD itself identifies incompetence simply if it is not carried out properly. You can't fake ISD. But then, if it's so helpful, why would you try? Because the ISD procedure is fully set out in methodology, the only remaining variable is personnel—your backup for this project. As in any other administrative effort, quality of personnel is critical. The people you will select, their willingness to observe the ISD procedures, and their ability to comprehend the thrust of the

direction you set for them will determine the quality of the program that results.

The proper development and implementation of any program requires a number of specific talents that must be combined during the process; these talents are sometimes found in a single individual, but more often, several people will become involved.

A half dozen or so different *functions* must be satisfied; whether one person or a team handles it is irrelevant IF the topic is approached professionally—that is, fidelity to the job/objectives, rather than to what some persons might subjectively prefer or even champion without examination.

It is the thesis of this book that you *can* develop a project entirely alone, if necessary, using all ISD procedures. You might not have the time to do it all; you might not have the interest. Yet someone must do absolutely everything. Outside viewpoints often help. So a team setup is provided, just in case. Mix and match as you must or wish in order to cover all functions.

In any case, have confidence in the ISD procedure—it's been proved over many years with hundreds of thousands of trainees. Or do you suspect that your company hires persons less motivated than the military sees?

Here are the general responsibilities commonly assigned to each ISD function; there are no absolute limits or rigid job descriptions. If a better assignment split works, use it. But even so, be absolutely sure to cover all ISD functions.

Training Director:

Generally the overall responsibility for overseeing subject matter of all technical elements and personnel of the training function (from initial needs assessment to actual operation of the completed program) falls under his control. He need not be equally adept at every function in the training responsibility, but he must understand all the relationships involved, so he can make professional decisions.

As a matter of practice, most Training Directors have probably been classroom trainers in the past. Yet relatively few of all trainers have had professional training development experience in their training careers. There are frauds, and you should be alert for them. As a result, some people tend to be more concerned about verve or style or paroxysms of enjoyment (as in *enjoyable* brain surgery or cancer treatment) with which a fellow trainer is performing on the platform than with the validity of the program content that he/she is delivering. According to ISD strictures, that won't happen to your program.

Ideally, your Training Director will have had enough experience so that he can rule out the dumb ideas that surface early in every project; enough security so he need not feel threatened by the good ideas that sometimes appear from the mouths of babes; and enough confidence to take judgments and decisions derived from the job, rather than from personality and other political considerations.

If your organization has such a man, and if he has the interest and the time to do the job right, you're in luck. If he has the interest but not the time, you're still ahead of the game. Regardless, sign him up, value his opinion, and let him force you to justify and validate your decisions, just as you'll make him justify his. If he agrees to assist, then he will be working with all the others—named below; but over the long term he will work most closely with your Project Manager, no matter how large the team.

Instructional Designer:

Generally this function is concerned with clarifying and relating the ideas inherent in the objectives and the expression of the solution in terms of the syllabus. That is, the instructional designer works largely with concept and theory to produce the first tangible evidence of a program's job requirements: the task analyses, hierarchies, and job performance measures. Then the tests and first rough outline drafts detailing the entire program

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content should get his attention. Remember that he/she is an architect, not necessarily a bricklayer. Others can easily do the jobs he identifies and outlines. Design is a critical contribution because only with this tangible expression through outline can all parties begin to determine for sure whether and to what degree their ideas correspond. Conversations are too susceptible to misunderstandings and omissions to replace outlines. Changes and adjustments will be inevitable and are not evidence of a job poorly done—rather of a good job progressing by normal iteration. The first rough outline(s) become(s) the basis for the questioning and validation of every element that eventually makes its way into the final syllabus. Ergo, *program content* roughly decided.

Generally the first outline will include a *simple* statement of objectives—that is, a (laundry) list of terminal behaviors sought. It is not a CSO, or *Complete* Statement of Objectives because it is still too early to stipulate the test items and conditions which establish competence and so mark the Complete Statement of Objectives. Even so, a task list alone is not sufficient as a beginning point—some development in outline form is required as a means of *interpreting* direction for discussion.

Instructional Systems Specialist:

The practical counterpart of the designer theoretician, the Instructional Systems Specialist is skilled in the conversion of programmatic concepts in text and technology, under specific conditions and settings, with specific types of media. That is, he makes a workable program out of the outline's items. This function is obviously distinct from the nebulous ideas and expectations with which hypothetical programs often begin. While your ISD might assist the instructional designer in creating the task list and hierarchies and outlines, the development of ideas must not be inhibited by too-early a consideration of How-could-we-make-this-work? At the same time, it is healthy to know (if it is true) that Such-a-thing-cannot-

possibly-be-done. The caveat is that often anything that has never before *been* done is usually considered undo-able. That's a mark of narrow intellect, and it can be most destructive, especially if it occurs early in the ISD process.

Content (Subject Matter) Experts:

The subject matter (or content) expert is exactly what the phrase implies—that job authority who best understands how to do the job in question for which the training is being developed. He/she can perform the job—no guesswork about whether the person is real and capable. In the sense of test pilots for new aircraft, he/she is now considered a probable doer in a future and non-extant job. He/she understands task sequencing (what must be done first and second, as well as subsequently: think ahead!) and also can determine what is important to the operation and what is incidental. He/she has or can get the answers for the designated existing job. Your chosen person should be doing well now in that job (or must have demonstrated his/her competency recently, preferably in the exact job under discussion.) Twenty-years-ago "experts-that-never-were" are a bane in the industry because the world has changed enough so that those "experts" can hid their shallow past behind the years; jobs also change; and by-guess-and-by-golly training procedure surely should be dead.

But in the program you are contemplating, especially if it will be functioning outside the organization, job or content (subject matter) experts might not be available in-house. You might have to borrow expertise from Dealers and Distributors, who have experience in marketing and know competitive points and current consumer hot buttons.

In the case of public/civic service, you might be dealing in a newly-identified problem area for which there are no ready made experts. Then, like all mechanical inventors, you must determine (preferably according to ISD principles, not trial-and-error) what types of program elements, if practiced, would/should result in

the type of behavior or competency you are seeking. In some instances, as you go into the revised outline stage, you might isolate one or two key areas for which you can obtain outside expertise; do so, and get on with the balance of the planning as an inside project.

Media Specialist:

If you have equipment, somebody has to know how to operate it. Generally the Media Specialist is an authority in (and too often a promoter of) mechanical or electronic equipment. Since specialists sometimes specialize, you might have one media specialist for video and another for movies and still another for slide films. Each might consider his technique to be paramount, but together they should get all needed images on the screen. They are all *images*. The eye doesn't care how the image is projected. If you allow advertising and promotion to determine your winner, that's a prelude to problems, if not outright disaster.

Occasionally you might have a person on staff who is competent in all mechanized media, and his/her unbiased opinion can help with format vs. format. Yet he/she often is still biased toward the *overuse* of mechanized formats—they provide his job. So the Media Specialist is not the best person to ask whether his media are needed unless he can tell you why in writing. ISD provides a very dependable algorithm for choosing among any potential selections. Once your decision has been made, the Media Specialist should be able to help you to obtain the optimum benefits offered by any medium. Producing superior results from *your* selection—not implementing his opinion on how to jazz up your program—is his function. Jazz is music, and it's essentially meaningless in training for non-music needs—unless you're just trying to show that you're trying, but don't yet know how.

It is unfortunate but true that all three specialists noted above could turn in a creditable performance in strictly tangible

equipment terms without knowing what they're talking about in *programming* terms. So they could develop an impressive outline of the way in which to work machines and gadgets into your program without knowing whether such gadgets are appropriate for the job. Or they could be dealing in irrelevant, esoteric, or even marginal aspects...missing facets that only an insider could know such as, Can your salesmen handle that equipment easily? Therefore you need the guidance of the job/content/subject matter expert, as discussed above, but only for comparing the likelihood of buying and then operating the chosen equipment. ISD itself provides algorithms for selection of equipment. No specialist needed.

Trainers:

Somebody has to do the teaching work. In general, the Trainer is the main platform person. He needs to know the material, because if he disgraces himself with dumb answers and stalling, he will be found out. Then his credibility evaporates. And your program could be lost. Import other specialists if needed. If ever a Trainer flunks his knowledge test, throw him off the platform. Military experience has proved that it's easier and more convincing to teach platform skills to a job incumbent/expert than to teach the job to a platform specialist. Everyone prefers the experience of someone who has *been there and done that* in truth.

Yes, trainers need a little polish and, preferably, prior platform experience, but they can develop that in rehearsal if they've never taught before. Subject matter knowledge is paramount. Without it, you have nothing.

There are other considerations. Patience and compassion are needed; hope they occur naturally. There's no faking it. Most adult learners are concerned to some degree that they might fail, and it's the Trainer's job to prove otherwise. Of course you prefer articulate people in this job, but that ability serves cosmetics rather than essentials. On the other hand, you don't

need a speaker who cannot be intelligible at all. As the phrase goes, "Strike a happy medium."

Project Manager:

It would be nice if someone could hold all of this together and report to you at requested intervals—other than at panic times. As we mentioned, the Project Manager will be making the policy and judgmental decision—alone or with you, if you decide not to do the job (alone). He/she can do that in conjunction with the Training Director (if you have one,) or the major Trainer. Choose the person with the clearest understanding of what must be achieved, and give him/her the task of implementing whatever program is created.

If you both have a clear understanding of the objectives, he/she can relieve you of all but the bone-crushing issues—if any. Wisely chosen, the Project Manager will be able to make comprehensive reports at all developmental stages and keep you abreast of all accomplishments to date. Sit in on whatever conferences you like—then you'll have a good working grasp of what's going on at all times, and they'll know management cares about results.

Unless you hire a Project Manager for that specific task, anyone who has previously proved to be dependable and capable of managing a complex assignment and already has other duties and/or is already probably too valuable to spend an undue amount of time in your stead. Priorities! Do you know what a manufacturing company's Product Manager does? That's what a training Project Manager does, too, but with outlines instead of tangible goods. But if you need to go to a lesser level, there's still help available. See below.

Project Coordinator:

Although it would not be wise to limit this person's function to that of a step-and-fetch-it, there will be some substantial

amount of that occurring, and you should plan to spend the supervisory time needed. Or would you rather do it all yourself? The point is, at even a relatively low dollar cost and decision-making power, somebody must track the myriad details that go into any program. And since development of this program could also logically slide into the coordination of the training meetings or seminars needed, consider asking the company Meetings or Training Manager to do the job. In many companies, personal assistants or secretaries already do the job, usually without the title. If it's a major program, provide a suitable title, with a promotion on satisfactory completion: you might have found a valuable talent. If so, protect and encourage it.

The coordination of details—distinct from the process of developing program content—is largely a mechanical job, and it proceeds according to a set of procedures set out as a fully detailed system in the author's book *Sales Meetings That Work* (Dow Jones-Irwin, 1983; updated third edition, 2002). The system and control mechanisms established there apply equally to any other type of meeting and relate well to the ISD process and your subsequent meetings and seminars regarding this project.

Content Expert:

Your Content (subject matter) Expert(s) must bear full responsibility for the accuracy of the information conveyed because no one else associated with the program will have his proficiency in the critical job areas so minutely examined. If you have the luxury of two or more experts, each should be consulted. That can be accomplished either as their joint effort or as independently-prepared papers, later compared to identify discrepancies, if any. Be alert to the possibility of politics behind disagreements, and give little weight to any subjective opinions for which no antecedents or prior cases can be cited.

Consultant needed?

Your organization might have all or none of the needed talent on staff. If the former, your project can be launched at will. If the latter, which is most usual, you might be wisest to hire a training consultant—or budget for other exploratory work. A consultant should be able (personally or with his or your colleagues) to provide all the services needed to perform the function of Instructional Designer and Instructional Systems Specialist. If you do not now have a Training Director, the Project Supervisor himself can train himself under the consultant while program development proceeds.

The consultant must be given the same understanding that you and your Project Supervisor should agree on: regarding what the program must do. Methods are still up in the air. In addition, he must have access to the content experts, whoever and wherever they are. The relationship between the content expert(s) and the instructional designer/consultant should be based on mutual respect. If either is winging it, you're in trouble. If they cooperate, eureka! That's gold.

It is not the place of the designers or consultant to second-guess the priorities and relationships established by the content experts unless and until there are either proofs of error or demonstrable non-sequiturs or internal conflicts within the body of information given. In that case, the "expert" has disproved his expertise and (unless it's merely a dumb mistake) he should be replaced.

In summary:

When organizing your ISD project group, which might range from a few to a few hundred or more individuals, you must chair the first meeting. Give the participants all the objectives, and state them as clearly and as succinctly as possible. If any alternatives have already been ruled out (for instance national

scope or exposure of sensitive data), state that up front—don't let them waste their time racing down blind alleys.

During this first meeting, you control mechanisms for the program: Both 1) your Project Manager as chief and 2) ISD as the dominant introduced and endorsed controller. During the meeting, turn all pertinent files (copies, of course) over to the Project Manager and instruct all others to deal first with him in all cases not requiring senior policy decisions. Unless you establish his authority in this first meeting, he will not wield any, and your Project Manager (or Project Coordinator) plan will collapse. The loss will be as much yours as his, because everyone will otherwise come to you for answers; pray that the program doesn't suffer. At the end of the first meeting, the group assembled must see itself as an ISD committee or task force—call it what you will. The task of the ISD committee is to carry out the five basic steps of Instructional Systems Development, as outlined and discussed in Chapter 8 here and in *Common Sense ISD.*

Other material is valuable, too. Although you will have already completed a rudimentary survey of needs, the committee should re-examine the ideas you have outlined and complete a formal Needs Assessment. Never believe your first ideas are faultless. Against those identified needs, the committee will evaluate the inventory of programs and determine what can be borrowed and what must be created anew. That, in turn, will make sense only when the ideas you have roughed out from the Project Analysis Forms and the Training Program inventory have been refined to the point at which they begin to resemble true programs with identifiable content, format, recommended equipment, and project able cost.

In other words, the committee or task force you set up for the purposes set out for them must (as a whole) follow all the steps of ISD meticulously and responsibly. Individuals may be assigned only portions or ISD points but all must perform to standard.

We are of course assuming that a single program—or perhaps a small cluster of related programs—has been selected. If you have opted to pursue several unrelated directions, then you will ultimately choose between a) keeping the same design team but working them in tandem with separate teams of content experts; or b) setting up two parallel groups to compete. You might be working the projects simultaneously or serially, as you choose. Your decision will tend to be determined by the availability of key staff. But don't forget your own duties.

If you are going outside for some or much of that expertise, then you can launch all programs simultaneously. That, in turn, although more complex for you to juggle, would enable the organization to be active sooner in more areas. But is it necessity or ego?

As you can see, there are many value judgments that you must make at the time problems make themselves known. However, if you actually practice all the early theoretical material and the five specific phases of ISD, you're not likely to make uncorrectable mistakes.

What's really special about ISD is that it is based on common sense applications of specific procedures. It's virtually impossible to get the wrong answer when you follow the system. Moreover, because program development tends to stretch out over a period of several weeks or months, there's ample opportunity to evaluate any questionable program element against the ONE VALID CRITERION: the job itself.

ISD can help you work wonders with programming. The only thing you'll wonder is why you didn't apply ISD years ago!

Chapter 15

Implementing Your Master Plan

When we speak of implementing your master plan, we are, of course, talking simultaneously about its two levels: first, the ISD methodology that your committee or task force is about to undertake in pursuit of your original ideas; and second, the training program(s) that result(s) from the ISD process: The Training Side of the Program:

There are two caveats to be observed during the ISD process. The first is mechanical: be certain that the group you assemble for the purpose of developing a worthwhile program actually completes in an adequate manner each and every step required by the ISD process.

The second is judgmental: give those individuals the flexibility to determine whether the given idea(s) you have submitted are indeed the best possible expression of organizational interest and capability. In other words, allow and expect them to enlarge and improve upon their original charge from both you and others. Welcome fresh, new, valid ideas at any time!

Nearly all creative people report the same experience when dealing with a project: when the creative endeavor is really solid, it takes on a life of its own—it becomes a self-knowing entity. Some people aren't that bright. Therefore it determines and sometimes dictates which options are appropriate and proper to itself; and so, in a sense, the "creator" becomes the program's own fulfillment tool. Or, more commonly, an actor will say, "My character wouldn't do/say that." Often the director is tempted to change the dialog to suit that actor's intuitive knowledge—is it a clear mistake by the playwright, or does the actor really know better than the playwright what's underlying the dialog or direction? As with a canvas being painted (what's "right"?), conviction in the art piece itself results when everything feels

right to the artist himself. Do you let line workers rethink management decisions?

The ISD process is fully compatible with the creative process. The determination of what might become a promotable and helpful training program is a highly creative process of problem solving (or, occasionally, an intuitive leap of imagination) that produces nebulous ideas; these ideas must still be implemented by countless interrelated actions, best served by ISD, which keeps everything on track.

A workable analogy says that the plot of a play can be reduced to a few sentences, even if the playscript runs hundred of pages. Yet the *realization* of the play includes not only a lot of words and stage directions over weeks of rehearsal, but also the help of countless backstage people, props, and mechanisms. The play's concept is totally creative; the play's production might be highly (although not totally) mechanical. Ditto for your idea and its programmatic aspects. ISD is essentially the mechanism or instrument through which you work your will.

Your main task—assuming you intend to keep your hand in the process—is to determine when the changes made by the program development team and its processes are furthering your creative concept and when they are violating it. Then you should encourage or correct; and things can continue. If you allow the ISD process to become your prime control mechanism, it will function perfectly as a management tool; and administration of the project will become routine very soon.

Ultimately that loose project will become a cohesive program—first in rough form and then in refined detail. Implementation then begins to require that you go outside the ISD program development process to that of the *delivery mechanisms* for the project, distinct from its scheduled programming.

In other words, ISD will give you everything programmatic that you need for the, say, two hours of the training program; however, you must still create the awareness of the need for that program in its target audience; you must schedule the program;

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and you must get all the people and equipment to the right place at the right time for the training meeting or other implementing event.

The Meetings Side of the Program:

You are then engaged in meeting planning...and that process is essentially the same whether you will have a large or small group in attendance, although possibly faster in planning for the latter. Meeting requirements remain much the same even when the program needs change. The process of coordinating such a program is something that most Training Directors have had to deal with often before; perhaps this is a logical assignment for your organization's TD. If not, look to your company's Meetings Coordinator for help. Or see Cavalier, *Sales Meetings That Work* (1983; updated and expanded, 2002); and *Common Sense ISD* (2002)—all available through www.1stBooks.com directly or through other booksellers.

Even if you yourself become directly involved in the ISD process, which can conceivably be critical to realizing your ideas, you might want to delegate the responsibility for the meetings side of things. If your organization's convention or meetings coordinator consistently stages effective meetings that can prove their achievement, then you are probably safe in letting go of that aspect totally. If you are uncertain, continue to supervise the organization's meetings coordinator, too, until the running program produces the results you seek. That information, too, is provided in Cavalier (1983).

Yet, if your TD is not involved in this program already, all is not necessarily lost. A complete, integrated system for the management and production of any meeting or convention is presented in detail in our books *Sales Meetings That Work* (1983 and 2002 editions) and its predecessor book, *Achieving Objectives in Meetings* (1973, now out of print). All needed diagrams and outline guides similar to those in this book are provided in *AOM* and repeated in *ISD*. Consider the internal

control mechanisms to be secure in all of our books and so in your conforming meetings.

Selling the Program:

But in the last analysis, you are dealing with people. They have their own ideas and wills; they have moods and conflicting values. So you should expect to do some amount of "selling" of the program you are preparing.

If you are smart, you and/or your ISD committee will do some market research to validate the perceived problem(s) to be solved—or otherwise verify that an intended gift program actually will be perceived as a gain by its intended recipient audience. One planned program in Chicago failed to attract its target group because some ethnics were afraid of the revolving doors at the neighborhood school, and their friends agreed to stay away with them. You can't outguess the target group—so ask!

If your organization markets through a relatively small number of Distributors, you could probably do the advance work on the program yourself, either by telephone or in regularly-scheduled visits or product shows, but this is a mechanical task easily assigned to others.

If you have planned a general-market related program, and if your marketing chain is too extensive to permit casual or personal contact, you might want to prepare an advance letter outlining the project and stating that your salesmen or Distributors will have details. Then provide those promised materials on time.

It would be wise, in this latter case, to prepare a detailed presentation in either printed or A/V form so that all recipient groups get exactly the same understanding from all presenters. By A/V we mean simple sketches and key concepts and words on a flip chart to guide discussion, not a super spectacular production like today's music videos. The less you try to compete with high-cost multi-media spectaculars, the better

you'll be served. Keep in mind that a spectacular door-opener will probably create high and unrealistic expectations of the program that follows.

On the other hand, you do want your original presentation to look organized, intelligent, and professional. That's the tone you want to set for your underlying program, as well. And that can be done very well in a small folder or booklet. That tone should represent the mild organization of ideas, not additional wild cost. Outline your purposes—what the program can do, and for whom. You'll find everything you need already outlined in the Complete Statement of Objectives that your ISD committee will have prepared already. Because most of the people who help to implement your program will not understand or appreciate the directness and brevity of a CSO, you should expect to phrase it in more conversational language. But the CSO is your standard reference—use it. It'll work for you.

If you will be establishing a qualifier fee or if you must charge a per-person matriculation fee to create a self-sustaining program, do so up front. Give the reasons (quote the overall investment cost, if necessary), and stress the gains that each participating group or individual can realize at the fractional fee. Some people will decline to participate, free or fee, and so a "cushion" from curious applicants or other ultimate non-participants probably should be built into the funding schedule. That could result in a surplus of funds if the program should subsequently be oversubscribed—but that's a nicer problem to have to resolve.

Creating a self-sustaining program (which can be justified by size alone, in many cases) is one thing and creating a profit making program (which is often a disguised, shabby device) is another. By the former, you are advancing seed money—the recipients will tend the crops. By the latter, some people are simply creating a for-profit school, which, while useful, is not necessarily a service and certainly is not a "gift" to recipients or community. It could, in fact, be a cover for a rip-off, as a few have already been.

Thinking "Group":

It should be obvious that beyond the original-idea stage, your project might wisely become a correlated group activity for both the development of the program and its implementation. That means you will be asking the advice and enlisting the aid of a great number of people whom you might or might not supervise directly. Some will have skills to be duplicated by training; others will have the ability to create the mechanisms to duplicate those desired skills; others will select those skills to be trained; and still others will content themselves with the details of the meeting or seminar that contains the newly-developed program or module.

Yet, in a sense, you must expect to "sell" the program to its middlemen and participants—at least to some degree. Those whom you contacted in advance will probably feel some amount of authorship, however much justified, and will probably be enthusiastic recipients of the final product. That tends to argue for a broad market survey in the early stages, even if the public or other spectrum is involved.

Concentrate on the benefits of the program to the middlemen and the participants. Let it be known that the training program was strictly derived from the job to be done (the ISD credo)...that you tolerated no guesswork in its design and must therefore insist on certain classroom or course work conditions. The more professional you make the development sound, the less likely that anyone will want to tinker in advance for purely egotistical reasons. It won't hurt to let people know that you will be taking a post-program survey so that all comments can be considered for later fine tuning of plans. Any objections to that are probably irrational, and arguing will do no good. If irrational individuals confront you, put them on hold; go to their peers in other organizations, and return with written results in hand. The second time, they'll probably listen. If not, get on with your program elsewhere. Don't let any individual put a *downer* on it.

Moreover, one who is in need of training is rarely the best judge of what the content of that training program should be. Potential trainees often have specific needs that they understand, and they want those needs addressed. However, their personal schedule is not necessarily yours or the company's. They must adjust to reality. Hopefully, your program is comprehensive enough to cover. We are addressing an education concept here of Individual Prescriptive Instruction and it is usually not valid in a training context, even if valid in an educational context. Remember the difference? See Chapter 7.

This is not to say that your program will not need fine tuning—every competent program developer expects to receive feedback and make adjustments. Nor is this to say that none of your associates and participants/ trainees will have intelligent contributions to make—some surely might. So be open but confident of your facts.

What separates the valid appraisal from the egotistical bombast (or the professionals from the pretenders) is that the professionals derive their appraisals from a study of the materials and events, not out-of-hand pronouncements based on capsule descriptions or personal prejudices.

After the Dealers or Distributors have witnessed (or participated in) an actual session of the program, then they can make some comments that might be worthy of your inclusion or correction. Ditto for any administrator of any school system or community organization: the competent will study or experience the syllabus and/or program before commenting.

In either case, it won't hurt to be prepared with a brief written description of the program, intended for outsiders, stating (less formally than in a Complete Statement of Objectives) what the program will do for the participants; and/or what your objectives were in designing the program; and what it can do for the sponsors or middlemen. Your description can be prepared as a photocopied sheet for a leave-with, or it can be done up as a slick folder, if you plan a wide mailing.

As results and endorsements become available, those can be added to the written copy or simply conveyed verbally. Your program, your situation, and your contacts will determine.

Ultimately, the more successful you are in getting the various middlemen and participants to reserve judgment until after their own pilot attempt, the less political the comments will be, and the more helpful the critiques will prove. Remember: let them help whenever you can!

All of this defensive action prepares you to implement the pilot runs *exactly* as planned; do not compromise any elements of the program for anyone's ego. On the other hand, if your programs will be conducted in hundreds of different classrooms or hotels across the region or nation, all results will be somewhat different in specific detail; so don't get bogged down in irrelevancies related to individual production factors and places.

If you will have both small groups and large crowds, prepare to serve either by preparing slides or filmstrips. These work in both self-contained rear-screen units and oversize photo blowups, and they also avoid the inevitable problems inherent in attempting to match electronics for rented or carted-about video units or tapes. Regardless of the A/V pitchman's claims, research by HumRRO has already determined that the skill with which any medium is used counts for more than does its cost or its *perceived* sophistication. Again, content vs. format. Buy help, not hype!

And, if sensitive or proprietary information is involved, determine whether and at what point you will release the program to outsiders to implement on their own schedules. Generally, that should not happen before you have completed the fine tuning and have assembled a respectable portfolio of compliments and endorsements. Then it's easy to demonstrate for doubter managers, on occasion, that the inevitable disappointed beginner might get merely the program/study results he deserves.

As will everyone else! Only the successful, as always, will admit it. Let stragglers work at it. Didn't you?

Chapter 16

Creating the Master Syllabus

Before the projects operate, you will have the opportunity and maybe the occasions to create several syllabi, as reflections of both options and inputs. Expect some combination of these:

First, each project that becomes a program will have its own syllabus for program content. You will have as many of these syllabi as you have master programs and variations; you know: math, civics, English, history, gym, geography. Remember? Each course had an individual Master Syllabus, but the School Principal had an umbrella Master Syllabus that included everything. Only the numbering systems differed.

Second, there's a probability that your organization itself has no umbrella master syllabus of all programs already in operation—if it has, you will not have to conduct the Training Program Inventory from scratch, because in that case, the master plan would already exist. Possibly you can improve it, but that's another matter. Whether that existing umbrella plan is a project or problem that is properly yours depends on whether you believe anyone else has the responsibility or can do a better job of organizing the materials. You might better choose to be practical rather than heroic: organize the batch if you will be borrowing a good deal from it (unless the corporate Training Director volunteers); otherwise pass the task off to training or personnel people as something that should be done by the company even though it's outside your sphere at the time.

Third, if you initiate more than one program—or expect to—then you might as well start making an overall plan for yourself. This syllabus might include everything to which you feel committed—and an ending numeral. The possibilities can contain all the second-level ideas that are of interest but lower priority.

The first category above is inescapable, and program syllabi will be produced by the ISD committee. The second category is voluntary on your part, even if significant to the organization. The third category, therefore, will become the focus of the balance of this chapter.

Even if you are successful in transferring most of the responsibility for the first two categories to someone else, you are probably best able to reflect the programmatic aspects of your own marketing or other plan as it relates to training meetings and seminars.

There are two ways in which you can approach the project. The quick-and-easy way is simply to collect the current program syllabi (or lists) into a ring binder. That should reflect whatever exists and shouldn't require much more immediate thinking. It also won't do you much good, other than to make a handy file for your bookshelf. We didn't say training is easy.

The better way is to organize now all the thinking you've done to date. That will cost you additional time, even if you will be assigning much of the responsibility of the formal program to the ISD Committee. However, fresh thinking will also commit to paper the ideas that are fresh in your mind at present but will begin to blur before long. Generally, you can do from memory and quick ring binder referencing now what will take much longer for the restudy and research and cold referencing later; now is the efficient time.

When you begin organizing your ideas, you can organize according to the windows you have explored, or the separate marketing channels you want to address, or according to near-term and mid-term and long-term windows of opportunity, for instance. The variations are limitless.

A Case in Point:

It's probably easier to detail the Sales Training Outline (Syllabus) we once developed and first used in variation during the mid-Sixties by one of the nation's largest consumer

electronics manufacturers, among others. It guided the development of a comprehensive new training program over a period of three years needed to fulfill the outlined requirements. With adjustments by staff, it remained valid (in a new manager's parallel version) and workable for over two decades. Moreover, this outline has been used in various incarnations since; perhaps the most unusual application was its use as a model in training sessions regarding an Inventory and Material Control Master Plan for one of the West Coast's largest industrial electronics manufacturers.

In the sales version, the type of individuals remained the same, although there was a provision made for specialty training as the trainees progressed in years and skills with the company. The specialty training reflected both geographical differences nationally and product emphases within individual districts and regions. So there was both national consistency and regional difference—the best of both worlds.

By contrast, inventory control was similar to sales in only the need to reflect accurately for each and every assembly part (numbering in the thousands of pieces and controlled by computer) the individual manufacturer's lead time for delivery. All the trainees were not only in different relationship to the activity within their respective departments, but also each of their plant departments was different. It didn't matter—the topic was new to all; success depended on study, not department.

When we advised a controlling syllabus to a Michigan manufacturer of office goods for a producer of programs who was bidding on the largest account of his career, the product sales supervisor understood the concept from one review, accepted that control mechanism as a competitive plus, and gave the training account to my client...the same day!

What this matter shows is that the outlining procedure works when it accurately reflects the job to be done, whatever that job is. We proved to ourselves the value of the outline as a control mechanism long before systematic design was codified for the corporate world as today's ISD. We discovered for ourselves

that *imitating the job* worked in training. Today the word is *simulation.*

There is no doubt that a Master Syllabus is essential to control, nor that a common sense analysis of the given job dictates the training needed for that job. Here's how our original control plan probably looked:

Master Syllabus (Generic)
(Corporate Sales Training)

I. Personal development:
  A Initial development
    1. Pre-hire information (recruiting)
    2. Post-hire orientation
        a) insurance
        b) vacation
        c) salary review
        d) company car and expenses
        e) central and continuing training (field)
  B. Near term development
    1. Company size vs. competitors*
        a) size and sales volume
        b) reputation
        c) market development
        d) et cetera
    2. Company products in the market place (intro)*
        a) overall viewpoint of customer re: product
        b) market segment claimed and aimed for
        c) how and why our product is superior d) et cetera
    3. Value of systems (or product lines) as systems*
        a) line vs. "cherry picking" for Dealer/Distributor
        b) line vs. "cherry picking" advantages for end user
        c) backup: sales support and service
        d) feedback from field, as reported up
        e) et cetera
  C. Long term development
    1. Concept of continuing training now
    2. Strength of field training program/commitment
    3. Obligations of trainee and Dealer/Distributor
    4. et cetera
NOTE: *Under section I-B, items 1, 2, and 3 (and possibly I-C) are
  ideal for Dealer/Distributor seminar use.
II. Corporate knowledge
  A. Marketing services
      a) et cetera
      b) et cetera
  B. Service (salesmen and factory)

    C.   Parts and labor
    D.   Order writing/plant scheduling
    E.   Bid preparation
    F.   Specialist training and availability
    G.   Credit, returns, and billing
    H.   et cetera
III. A. Detailed knowledge
    1. Product line (related items) including function
        a) Product Item #1-a
        b) Product Item #1-b
        c) Product Item #1-c
    2. Product line (related items) including function
        a) Product Item #2-a
        b) Product Item #2-b
        c) Product Item #2-c
    3. Product line (related items) including function
        a) (list all)
        b) (et cetera)
NOTE: Each product should have its own (sub-) content, syllabus, and
    lesson/session plan.)
B. Markets in detail
    1. Market #1
        a) description
        b) segment #1-a
        c) segment #1-b
        d) segment #1-c
    2. Market #2
        (list all)
C. Selling tools available
    1. Technical manuals;
        a) list
        b) list
        c) list
    2. Service manuals
    3. Prospecting outlines
    4. Product folders and leave-withs
    5. Maintenance and installation
    6. Structured sales presentations
    7. (et cetera; (list all; few details)

IV. Salesmanship
  A. General rules of thumb
  B. Offering "something extra"
  C. Competitive comparisons
  D. Meeting objections
  E. Structured presentations
  F. Anything other
V. Group Supervisor program
    (Actual, to be sent if applicable)
VI. District Manager's program
  A. Recruiting and Hiring
  B. (Actual, to be sent if applicable)
VII. Appendix
  A. Training schedule (relatively foreseeable future)
  B. Training checklist for individuals
  C. Control chart (logistics)
  D. Additional ideas to be implemented if/as needed

For your purposes, consider that the foregoing is a valid initial and usable outline of needs. If your program differs significantly for this outline in concept, ask yourself why? There is no absolute standard outline, of course, and yet most programs must provide the basics included here. Add anything necessary. The numbered categories above will become ring binder tabs in your outline—we'll call them by generic headings hereafter.

Within these tabbed headings, each and every identified need should have its own separate ring binder page; whether tabbed or not is your choice. Obviously Tab I and its alphabet subheads might have only a few pages to contend with. However the corporate material under Tab II could be extensive: all the services proved by sales support and factory personnel, plus all the individual products and systems, plus all the identified markets, plus some loose ideas. All that plus your entirely new training program with sales techniques, itself requiring a major syllabus to control. If you're going to study the entire company and policy, get a large ring binder.

In the original, our equivalent of Tab III had identified a perceived need; but never before had formal half-step training been offered. Each salesman struggled alone to merit attention and win consideration as a potential branch manager. When the tab was added to the original ring binder, this section was blank except for the page that listed and described the perceived need. Fulfillment came later.

Ditto for Tab IV. All of the forms and checklists, etc., of Tab V would be practical helps to the local field manager. The tab should cover a chart-pad size pre-printed graph (see Managers Course Control) plus a smaller version (See Trainees Course Control) that served to control all the elements in the ring bindered Master Syllabus for every person in the office.

At the time the electronics company's ring binder was put together, a significant number of its fulfillment packages (or modules) already existed. Some them were up to date, and some were sadly outdated. Therefore a color-coding scheme was adopted within the ring binder system. All syllabus ring binder pages that merely identified a need but offered no specific module titles or material were colored pink; eventually, all the pink pages were to be replaced by the proper code color for that given section when the training package was on the shelf.

The particular colors you use are, of course, immaterial. However, if you use blue for product information, and maybe green for technical support information, and maybe yellow for product support information, you begin to see how fast the color coding itself provides a quick-reference key to identified, already fulfilled, and future needs. Just blitz the pinks.

The original ring binder syllabus of the electronics company had more pink pages than any other color; that is, a staggering number of needs had been identified, and it was obvious that several years would be needed to address those individual needs with new modules.

For the purposes of administrations, each field manager can be made responsible for teaching those topics, whether or not a module is already available. When new modules are completed,

then a colored page(s) with course description will be inserted into the ring binder and a new package will go onto the individual manager's shelf. The process is so simple it's shameful. Don't pay outsiders to "suggest" and do such simple things! Try it, and you'll look like a genius! Total payout cost: ring binders and photocopies, if you wish to distribute.

For most managers, dealing without prepared shelf packages will not be a new burden; actually to have a ring binder reference of identified topics should help remind them (and verify) that each manager is doing a *complete* job of training. So you can expect their cooperation.

Managers change. The subsequent training manager decided to start from scratch and develop "his own" program—which, by his own words, was basically identical to ours. "Did you ever feel you'd just reinvented the wheel?" he asked me one day. That program lasted for decades with only minor adjustments (changing a page color and a module to accommodate new products). Modules can be scripts or A/V slides or TV tapes or computer discs, or combinations.

Over a period of two or three years, expect your Master Syllabus to change from predominantly pink to varicolor. The change itself is a visual check on progress. Within six months of its creation, every major category of the Master Syllabus had one or more of its program modules in place and functioning in the field. Something-for-everyone saved priority fights and helped gain acceptance. That yielded a fast start: efforts in numerous directions simultaneously to answer complex needs... yet all related to a cohesive whole in everyone's mind because of the Master Syllabus ring binder, then still in its initial stages. During the fill-in period, you might be able to use certain "library" programs personalized to your needs—only you can know how well a generic program might aid you. Few can be used "off the shelf," and you must *know* basic training concepts and principles before you can customize them—or supervise their customizers properly. Is there another way to protect yourself?

Anatomy of any program:

Several corollary needs will make themselves known while your needs assessment is in progress, possibly via field trips.

First, much of the basic information found should be elementary; therefore common to all new hires; therefore so frequently repeated as the company grows that only a central school might be able to make consistent those skills needed by a large flow of people at lowest cost. Consider video conferencing. Second, if a central school were to be established, the hiring procedures would have to be timed so as to meet those announced school dates. In order to do that, the managers have to understand how long the hiring process actually takes on average and gauge their respective job markets accordingly.

Third, to get a higher caliber of employee worth that fuss, you'll probably need a Recruiting and Hiring training program for managers involved—it'll probably red-flag its way to a high priority. It can be answered with a commercial R&H program personalized to the needs of the firm.

In the case of our client corporation example, those of us who were making the field checks also discovered that because some recruits were fresh from technical schools and others were fresh from related fields or even from competitive companies, the original hope of treating everyone identically soon discredited itself. What was needed, obviously, was a plan flexible enough to permit fill-in training for the individual salesperson according to individual need.

That's where the syllabus proved handy: everything necessary and/or available was identified for the managers. All salesmen could get certain information (largely company or product related), but individuals could get background training compatible with their own strengths and weakness compared to their own selling assignments. Ultimately the local market could dictate the needs, and the local manager would have a free hand in fine tuning the training to his own needs.

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That, in turn, dictated that the central school would do only the largely-identical training, and all other training programs would need to be conducted in the field. As a consequence, although much of the product and orientation could be taught centrally from lesson and session plans, those programs sent to the field would require—if only for consistency—a self-contained package. Later, that was loosened to permit fully-outlined written meeting plans with slots (or blanks, or such as our "et cetera's" above) permitting each field manager to drop in his own statistics, priorities, assignments, etc. Those materials were not shown to prospects or customers.

By that time, a tremendously complex program had emerged; yet it was not intimidating because it was so carefully organized and so easy to explain and justify in terms of its own structure that no one argued. What the fledgling program needed were just money and programming talent.

That was an indirect benefit of the Master Syllabus, too. Like all managements, top management of this client firm had previously budgeted for training (which it saw as a cost, not an investment in results) only those programs that the Training Director could clothe in *dire emergency* language. Most of the rest of the previous programs had to await the results of the first items published. Training still gets more lip service than money in many other companies.

However, in that instance (and possibly in yours) top management did an about face when it could review—finger!—the Master Syllabus. So radical was the departure that when a major chain of hotels asked whether the company would support a new facility if built on adjacent land, the management responded both with a *yes* to the hotel and an appropriation for a training complex at the plant, in addition to the hotel. The upshot of a tangible representation of need was that trainees brought in from different parts of the country and the world soon had a new home...as did supplier salesmen.

Don't credit everything to the syllabus *per se.* Credit something to a Training Director who had ideas he was able to

express in an intelligent, cohesive manner and to think big thoughts and reflect their size in a meticulous outline.

Had the Training Manager's thinking not been valid, the syllabus format alone could not have carried the weight of a pipe dream. Moreover, he had the ego security to ask his field management peers for advice and suggestions, leading to field trips to uncover facts and validate interpretations. Where did he derive his thinking? Answer: From the job itself, of course: he had been a star salesman and had needed to invent for himself many of the techniques and tools he passed along to the trainees. Not every salesperson can describe how he/she gets results! But training seems to be a slot for climbing. So, by logic and common sense methods, this client applied a rigid derivation of training from the job itself—long before the ISD process (by that name) had taken form. ISD is not the only conceivable process, but it is probably the fastest and most dependable, as well as being the only existing *system.* Numerous pieces of answers to needs (independently conceived by multiple authors, chapters, or topics, in actual fact on the market) are not necessarily a system—however big the book. People who know ISD know that! The common sense approach to your problems is simply the one that brings the best results. However, by using ISD, you can eliminate the error from trial-and-error before it starts. Forget about today's hottest fad and tomorrow's glitziest new piece of equipment. Those reflect what the customers—or, as P. T. Barnum said, the suckers—will buy. They buy what their neighbors are buying because they're insecure about their own jobs, which they perceive to be about hocus-pocus and hype. If that's their criterion for buying content, they're incompetent no matter how current the technology used. Think about your identified needs...or those problem areas for which the exact cause of problem has not been isolated. Isolate that problem, and you will have both identified the need and taken the first step toward eliminating it as a problem.

Training programs worthy of the name must solve problems. If they don't, the training itself becomes yet another problem;

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and still more time and money will be spent doing the wrong things for the wrong reasons; and still more in undoing the resulting mess.

Stick with ISD: it represents logic and common sense— systematized. And to help you with the process of control, we offer here a Trainee Course Control. Use it often.

TRAINEE COURSE CONTROL.

File one copy in the personnel file of each individual who will be trained in any or all of the Master Syllabus items, as indicated below. "X" out any programs NOT be to be completed now, and enter reasons in "Results" column.)

Trainee Name: _____ Superv Initials:_____ Date: ____

Training Program	Date Compl	Superv by	Test Score	Results

READER: REPRINT YOUR APPLICABLE (CONDENSED) ACTUAL MASTER SYLLABUS HERE; CHECK THE NEEDED ITEMS.

General comments:

Person's strengths and weaknesses noted:

Program strengths and weaknesses noted by trainee (for feedback):

Future/continuing training recommended:

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Chapter 17

Following Through

Unless you're absolutely perfect, even the best brand-new program will need fine-tuning in the "classroom." So no matter how good the program looks on paper, until it is fully realized in an intelligent, "live" pilot run and adjusted as needed, it cannot be said to live up to expectations or potential.

Furthermore, once the program is proved and operating, unless it is kept perennially fresh with periodic reviews and additional tuning based on feedback and normal changes of circumstances, it could quickly outgrow its usefulness.

That could happen for many reasons. For instance, if the instructors are not rotated, their enthusiasm can fade; uncommitted middlemen might find other items taking their attention; competitive companies might imitate; or target groups or individuals might make unauthorized changes and modifications and go their own way with "their" "new" program. Sometimes you can control, and sometimes you can't. In your own facilities and/or when your own personnel conduct your programs, there's no question about who's in charge; as soon as you go outside the company, control tends to be compromised, however unintentionally. Expect it. Plan to delay it. Sometimes, such as with non-product programs, it won't matter much. But if you wish to maintain a certain quality level, that should be made a matter of written agreement, up front: no tickee/no laundree. Although you are establishing a partnership arrangement with whoever (outside) agrees to be your guinea pig, once the program is proved, you are in the driver's seat with all others.

There might be some question about *proof*. A lot of different standards are applied to that word, reflecting the principles of different fields. For a laboratory scientist, something is proved when the results can be replicated by others.

In a logical argument, the proof is a citation of an unbroken chain of valid syllogisms. In a literary argument, proof is the citation of accepted similar or related thought by respected experts that supports the given thesis. For the Federal government, proof of the safety of food and drugs is represented by exhaustive repetitions of tests or histories, with statistical evidence preserved. Or so we ve been told.

Unfortunately, none of these proofs apply to the training program. If a training program's requirements are rigidly derived from the requirement of the task/job itself, then a) anyone competent to perform the training task will pass the job performance tests toward which the training points, and b) the pilot run's guinea pig trainees will succeed. Success (job capability) is proof. For accuracy, more than one trial with more than one trainee is recommended; but you don't need dozens or hundreds of either trials or guinea pigs, unless you are purposely testing specific variables. And don't let designers cheat the system! Conduct every item of inquiry needed, even if people supposedly "know it all" already. If you take chances, you obviate ISD's fail-safe methods. That's working against yourself!

But in general, if a course works satisfactorily in its first test with "typical" trainees, it will work in the field, given instructors of equal competence. At least, I have never witnessed the contrary nor heard of contradictory evidence. So two factors remain after the initial test and the internally-realized adjustments: gathering feedback for initial appraisal, and garnering recognition for the accomplishment.

Feedback and Variations:

As indicated in the previous chapter, the only feedback worth considering is that from persons qualified to judge—that is, either topic experts or training process experts who can comment on the paper product or those individuals who have already completed portions of the program or the whole of it.

You cannot incorporate every instance of every type of comment. You might also have comments valid for that one individual (or his own groups) but valid for no one else. Don't make the mistake of adopting suggestions wholesale and then projecting them onto the world at large. You can adopt that given suggestion for that given group only, if enough of their trainees are ultimately involved. You will undoubtedly be making some executive judgments throughout the long process. Deciding that such a given change will be useful to a wider audience while another will not be. Not everyone will be happy—too bad! You must do what you must d̲o̲.

The last elements to be discussed—though implicit in everything preceding—is that the ultimate effect of your program is on people. They are both the end point and means of programming.

For instance, virtually every organization in the world considers itself to be "different" from all the others. In detail, certainly each is, but don't all companies operate on roughly the same principles of economics? Roughly toward the same grail of profit? Suffer from similar employee turnover? Similarly, each of us is considered different from everyone else, and in details we are. But is there no norm to people? Their vision of an Enforced Norm is what the Religious Right is all about.

Moreover, our travels through more than forty countries have convinced us that peoples are the same all over the world. All peoples have similar hopes, fears, and needs, but their cultures demand different responses and "fitting in" procedures. Man's governments and religious sects and economic schemes tend to become limiting entities that promote their own goals at the expense of the individual. Don't let that become a function of your programs. So don't be dissuaded by ideas that some individuals will advance, unless they are actual topic matter (subject matter) experts. Don't spend your life accommodating armchair experts.

Always, your ultimate reference should be your Complete Statement of Objectives. Your course cannot accomplish

anything different from what it was designed to accomplish when tested under those circumstances and conditions stipulated. Do not be argued or cajoled into violating the dictates of your CSO.

There will probably be circumstances in which slight or significant changes in approach or subject matter might result in slight or equally significant changes in program, and so, in results. If the given matter is of interest, it might be worth working out and testing. Even so, don't simply edit the original untested and expect that the outcome will be wholly predictable. You might need a new set of CSO's for each potential variation. You might need totally different tests. In other words, any change you make to a tested program that's not dictated by formal evaluation could subsequently result in a failed or unpredictable performance level.

To reneg here is to do violence not only to CSO's but also the the precepts of ISD by which you developed the original program. To come so far by design and then to introduce failure-prone guesswork would reflect sloppy thinking and incompetent management. In short, whatever the pressures from whatever the sources, do not permit any unjustified or untested changes to be made!

Dealing with Success:

If you do a careful job of orchestrating all the ideas and people involved in making the ISD system work, you will find yourself with both positive and "negative" outcomes. Both will result from success.

The "Negatives":

Some of the people who have already been entrusted with programming and training assignments might not live up to their obligations to you, either because of inadequate background for their job or because of an unwillingness to work hard at it. Some

of these people will need to be re-motivated, and some, replaced. Their ability to function well *as ISD requires* will probably be the determining factor. The system will ferret out inadequacies—a self-diagnostic capability.

Most good administrators (and accountants) will say that removing a negative produces a positive factor, just as in math and accounting. So the term "negative" might not be appropriate in this context, assuming that you act on specific knowledge of requirements.

That could happen in your organization, too. More accurately, it is likely to happen. Moreover, it could also happen to the Dealers and Distributors who implement your program, depending on the nature of the training. So they should be prepared to act on "negative" situations, too.

The Positives:

Change is inevitable, normally, and increased in rate as a result of an effective program of any consequence. The changes will happen because as people grow, they mature and take on added dimensions. Sometimes those dimensions are applicable only to the jobs at hand, but occasionally (as with educational programs) the results are reflected throughout their lives. In many instances, if the new training opens radically new vistas for the occasional individual, it could result in heightened expectations: new ambition. This ambition isn't always easy to deal with, but it can be highly advantageous for the employer who provides ways to channel the new energy and drive. If the organization expects to release new human potentialities in an organizational vacuum, something's amiss upstairs. Only if management fails to accommodate new growth will there be significant problems. But for the most part, as the research of the humanist psychologists has already indicated, people do grow, and they invest further interest in the organizations willing to invest in them. Because of the demonstrated cooperativeness and responsibility of the majority of people (directly contrary to

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Theory A's heavy handedness) you can undertake new programs with confidence.

When changes occur, they might tend to cluster in these areas:

1) reorganization of the company training program itself;
2) perception of immediately-recognized program needs;
3) fresh perception of corporate social responsibility stances and needs.

It's not possible to predict either fully or generally what might happen as a consequence of a hypothetical market/social service efforts. There are too many variables that only you—when you've begun to narrow the options—can predict.

Variety in Programming Structures:

These significant training programs indicate the range of what can be done with some thought and might be applicable in manner or concept to solutions you might be seeking:

➢ Audit of technical field service training for nuclear diagnostic equipment revealed that while the training was adequate, unfavorable field cost ratios (actual vs. projected) reflected conditions outside the control of field service crews: difficult access to some minor items or avoidable damage by owner-users. User awareness training and minor redesign delivered nearly $100,000 in cost savings over three years.
➢ Knowledge skills training re: Federal licensing applications reduced rejection rates from about 20% of all submissions to 2% within weeks.
➢ Two day seminar on attitudinal/knowledge skills for Health Care Supervisors help contain negative outcomes

of patient treatment, reducing both patient suffering and costs, including law suits.

➢ Master syllabus governing the development of a comprehensive new sales-hires program (pre-hire through first promotion) has served a Fortune 200 firm for several decades via adjustments in market and new product topics.

➢ Audit of a series of central-school technical training programs for service technicians maintaining electronic machine tools ($200,000 cost) produced both a quick-fix trouble-shooting format and a long term solution: four levels of central/decentralized training on eleven parallel tracks.

➢ Sales/knowledge training re: a commodity metal created for the client's contract distributor network was credited by the client with moving the company's stock price upward, because brokers valued both the dollar and competitive advantages imputed to market results.

➢ Syllabus for a 20-hour attitudinal/knowledge skills program on master scheduling (JIT materials flow to minimize inventory) generated nearly $1-million annually in cost savings associated with interest and warehousing charges, compared to traditional methods.

➢ Retail sales/knowledge training program for a major appliance enabled the client's Distributor accounts' own reps to teach benefits; it refined sales techniques for retail store clerks from scripted materials accompanying the then-new product display center.

➢ Attitudinal/knowledge/dexterity skills training for low-level food service employees, used worldwide in six languages by airlines and hotels that buy the client's cleaning products.

➢ Ten part sequence (in AV modules) teaching attitudinal/dexterity skills to supermarket stockers and checkout personnel to achieve consistency.

> ➤ New-product introduction of an office seating line, based in part on anatomically-valid knowledge of dexterity skills never before taught in that non-medical industry.
> ➤ Airline destination - awareness descriptions for sales persons were printed in a 16 page booklet (illustrated) and distributed to Travel Agents for their travel clients.
> ➤ Numerous conversions of the clients technical or training information into benefits-oriented, consumer-viewpoint sales or public information presentations; many, many in audiovisual formats.

Some clients served for whom the programming work above was created and measured:

> ➤ —Corporations: Motorola, Varian Electronics, Haworth Office Equipment, PRM/Lloyd's of London/County of Los Angeles Hospital System, S.C. Johnson & Son, Kimberly-Clark, Budget Rent-A-Car, GTE, Iberia Airlines of Spain, Kaiser Aluminum, General Foods, Wescom, Centel, Mobil Oil, Norwegian America Ship Lines, Admiral, Manpower/Salespower, Swift & Co., Karpen Home Furniture, Signode, Diversey.

> ➤ —Associations: American Gas Assn, Steel Service Center Institute, American Dairy Assn, Linen Supply Assn of America, Railway Progress Institute, Out Board Boating Club, National Coal Assn, Supermarket Institute, American Meat Institute, Automotive Service Industry Assn, Liquid Petroleum Gas Assn.

In the sales training program we helped to design for a Chicago metro-area manufacturer of electronics, benefits fell one upon another: The new salesmen performed sooner and better in both sales volume and administratively than did their peers of earlier years. But there was also an upswing in motivation, too. Performance is the primary test of any training program: this one really performed!

Because these salespersons produced sooner and better they developed enhanced confidence, which enabled them to tackle larger target prospects with new applications. They sold far above "new person" quotas, permitting the company to adjust its sights generally. A logical but unanticipated result was that as the failure rate of new hires declined radically, the longevity of employment among the newly successful men increased beyond that of their older peers.

Promotional moves, which could not be expanded as fast as could the newly-trained force, made competitive skills more apparent. And because the proctoring of regional/local classes and self-help modules identified the eager-beavers, promotion-selection and leadership qualities were easier to identify. Finally, the District Managers understood—when their assignments expanded to include new learning methods—that they were being treated like intelligent human beings, and they responded accordingly and with renewed enthusiasm. The program was simple and awesome, according to statistics generated. How many ways would you like to save money? Presenting an individual with the tools and training to do the new job expected of him is not only essential, it is the mark of competent top management.

There were, of course, other successes in the same company. An entire syllabus of training needs was created. As each of the known or additional packages or module programs was introduced to the field, results were gathered. Since most of the packages had never before existed, it was not possible to compare against past results on a case by case basis. On the other hand, no program is ever funded without some expectation of performance, or ROI, and the packages seemed to outperform those estimates.

One program, which dealt with Federal licencing procedures, blew the top off the results column, dropping rejected rates of submissions—Federal application rejections fell from 20% to 2% of total submissions—a 90% reduction in error! That's a training proof! It was done simply by reorganizing the

applicable field materials from the discursive running order of government-issued regulations into the application forms' own running order of application/discussion, with potential rejection reasons and warnings printed on a celluloid overlay to the form. Easy. Logical. Inexpensive. Because that high-priority program was one small part of the Master Syllabus, the MS package contained (besides the booklets and lectern script) a color-coded program description sheet to replace its pink counterpart (identification of need) also in the Master Syllabus with extant-program descriptions. So one more part was fitted perfectly into the master plan—which, because of built-in up-dating, was perennially current. There are new products now, and different markets—therefore a revised syllabus overall.

Simple clarification of tasks and explanations also helps in many cases. Two hospital complexes with which we have consulted both reached the same conclusion: that human concern saves money over the *hide-facts* contingent's preferences in the healthcare industry currently. Insurance companies' "given" *claims-made* statistics are simply an incomplete universe among iatrogenic injuries—therefore, wrong! That has been proved by these clients and others; but as a whole, the insurance industry won't admit it, and politicians are loathe to challenge the status quo among contributors. The two client complexes have both benefitted from that knowledge—but patients are still being unnecessarily injured by current denial and specious reasoning and methods at perhaps all other health care places. The difference seems to lie essentially in *management* attitude. Attitude (called "affective state") is a valid direction for training. Don't be afraid to include it. (Chicago Tribune *Sunday* Magazine feature: "Strong Medicine," December 7, 1986.)

As noted early in this book, there's an abundance of idle information in the world but a dearth of applied information. Any information that your organization "owns" but has not yet converted to particular usage is simply idle. And that's a waste of an indispensable but scarce resource: knowhow.

Application to Your Needs:

Now let's apply that client experience to your case.

First, if markets or marketing theories change, and if you conduct a comprehensive review of what's available in in-house commercial marketing training, you are likely to spot huge holes in the fabric. That field is top heavy with rule-of-thumb sales training and thin on human relations and consultative selling. Alternately, you are likely to understand, from the preliminary surveys that come back to you, why you are experiencing problems in particular areas. So (as a matter of your inquiry) the company could be on the brink of taking on a major long-term rethinking and redevelopment of existing sales and service training programs—quite apart from the specific market-oriented programs you're now planning. Those outcomes might or might not affect your willingness to proceed. ISD will take you wherever you need to go! You can depend on it.

Second, if your analysis extends company-wide to all related line departments and even to the Personnel Department (staff), then you might accidentally identify needs throughout the entire organization that have never before been identified or addressed. The organization itself could be on the brink of a major shift in emphasis from or toward internal training vs hiring by somewhat more stringent prerequisites. Would it be less expensive and/or more productive to raise or lower the entry level skills of applicants for a given job under the organization's current training capabilities for that job? Future?

Third, if you make expertise available among marketing distribution networks and to management or staffs of Dealers and Distributors, then the same upward pressures could surface there. While there is perhaps no immediate promotion in sight for a floor salesman in an office equipment shop owned by the boss, nevertheless, key employees could be given outside sales call responsibilities with higher commission, in addition to floor duties, until a permanent transfer to exterior sales is justified. That expansion of responsibility (job enlargement) will tend to

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absorb much new energy and could produce added revenues, which can in turn justify increased salaries overall. This is only one way in which space can be made in a small firm for a growing individual. Or would you prefer that the good ones move on?

Fourth, if you develop a social services program that addresses the real needs of the disadvantaged or handicapped or minorities, or other relatively distinct segments of the general public, be prepared that a successful program will probably bring requests for expansion of that program beyond your needs and budget. You might then expect to be pressed to decide whether it is more advantageous for your own organization to attempt to provide an ever-greater number of trainers or to release the program for general distribution via the target group itself.

Fifth, if you create a pilot program in special community service for the general public (whether or not a token fee is attached to defray costs or help qualify legitimate interest) then you should be prepared for the fact that success could outstrip the resources of the organization in every way; you might be required to publish your program in response to demand. And perhaps the design of any program intended for the general public should provide originally for this ultimate what-if?

Sixth, if you decide to participate financially, but remotely, in announced public/civic projects, then you will not have to deal with any of those potential hazards of success. Someone else will be running interference. But neither will you experience the exhilaration of seeing some of your work transform the lives of individuals in the community or even larger groups.

While you will certainly be undertaking a major task that might present headaches and work overload from time to time during its development, you will also begin to feel the satisfaction of doing something worthwhile for others while doing your job. That's the hidden or psychic income identified by Maslow and other researchers as being more important than monetary reward to many self- actualizing individuals. That explains the dedication of many talented people who work for

causes for which they are not "properly" fitted (as our money-conscious society views it) but who nevertheless enjoy their work more than do many money grubbers.

If your program of assistance (which is the foundation of training) is to succeed, it must have heart. It cannot have heart unless you invest it with genuine concern for the welfare of those you are aiding or training. You cannot "fake" respect and consideration.

Although you will be constrained by the interests of your organization as you work, keep in mind that in the world of values, people are increasingly making value judgments apart from money. It is in the interest of your organization and yourself to be respected for your valuable programs—in the marketplace and beyond. The corporate image will be enhanced. Respect and profit are not mutually exclusive considerations.

Many people believe that the time will come when a corporate charter will be given conditionally, requiring continuing proofs of contribution to the general welfare. Profit will not be viewed as an inalienable right of those who can rub a few dollars together, but rather as a licenced reward for contributing to the human progress of the world. That term, *human progress,* does not rule out either beneficial technology or person-to-person help.

If you succeed in investing your program with heart, it will be understood and accepted in like manner; and if you invest it with a modicum of value thereafter, it will likely succeed and return the results you are seeking.

That circumstance would lead to claims of success and the measured results that prove the claims. If you keep in mind that rigid derivation of the training from the job itself is the hallmark of ISD, then the job itself will suggest (and job experts will confirm) which test methods and practices will demonstrate a job-related *proficiency.* Nothing else is acceptable as a measure. The best tests will always be expressed as *doing something needed.*

If a dozen or many thousands of people *do* something related to a job or job skill, that numerical accounting of proficiency level is the only direct long-term measure which is practicable as a job-recruitment standard. Why train people who probably can't *do* the job right? Both intelligence and attitude are at stake here, together with aptitude. Occasionally, attitude counts for more.

Non-specific or subjective goals are often not provable in the short term. Only when the program succeeds and is recognized widely will the subjective results usually show in related numbers. Sometimes results that you have never expected will show themselves.

It's not likely that people who talk in terms of market share or public image or trademark value will immediately see as valid the retraining of 300 non-employee secretaries or the language coaching of countless non-employee immigrants. Show them where the best interest of the organization really lies. Part of your job, then, will be to establish that equation.

Usually the dollar arguments will be the easiest to make and recognize. It might help to quote *The Corporate Conscience*, by David Linowes, who has developed the concept of "socioeconomic management" in his book of that name. If one can eschew the pinpointing of results in advertising (does one reader equal one sale?) and accept the aggregate effect expressed as market share; and if one can accept the same principle in public relations, expressed as favorable public disposition toward product or service, or in expansion plans, and bond issues; and if one can accept results of direct mail as "success" at approximately 2% of the mailing list—then you are justified in advancing your argument to upgrade skills—employee or not. The trainees might eventually work for you or buy from you or send employees to you. The effect will be goodwill in a manner no less defensible than other public relations results.

But don't stop there. Value judgments will tend to be the stumbling blocks. Some people have never learned to value anything that cannot be expressed in money terms. Even our legal system demands one-dollar-each-to-the-other-paid as a

validating condition of any agreement of even exchange. And, as discussed in an earlier chapter, we switched from an agrarian economy to a finance capitalism system in less than one century, during which money became the ultimate measure of achievement. Forget medicine and education and even creature comforts as measures of achievement...forget the buck as motivator. It usually activates only temporarily. Instead, grow up!

The history of the labor movement covers barely more than a century; yet all the issues of human concern for illness caused by anything from asbestos to radium to coal dust have resulted from the concerted effort by Labor, generally against the wishes and protracted opposition of narrow managements. Although the right of the employee to a safe workplace became a common expectation the word "safe" was (and still is) subject to varying interpretation by those seeking to perform the minimum against standards that themselves became the minimum. The key problem is that a single-value world rarely works. According to Maslow, money value operates at the low end of the human development pyramid, where our social consciences have appeared to be permanently wedged. That provides more security of basic needs, maybe. But it also tends to steal personhood.

Although it's rarely spoken of in specific terms, the likely source of corporate or professional or social conscience was the Flower Child period, the 1960s, in San Franciso. Social conscience seems to be the flowering of the seed planted by those seeking young people, and it has also contributed somewhat to the formation of the concept of medical patient rights, which stems from the same era.

In the past few years, juries have begun to return judgments against wayward managements beyond dollars: in an Illinois case involving the death of an employee on the basis of hazardous substances being handled without warning, an indictment for murder was returned by a grand jury against

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company officers. And the problems of probable dishonesty in the tobacco industry are being played out now.

In short, yesterday's safety issues became today's entitlements. So the organization is being shortsighted when fighting its employees' welfare, and possibly for not cooperating where and when it can. Managers need no longer be ashamed of generosity or caring. It pays as it helps.

Whether you think that your people will respond better to reason or to scare factors is your decision; both arguments might operate in your favor. The former surely will. But if you start with the human factors first, you will give everyone else a chance to surprise you with a previously-hidden depth of concern. After all, even many managers are human!

As a consequence of the conflict between old and new values, your best presentation strategy is to think beyond the obvious questions and challenges and toward putting the accomplishments in context.

When you can explain that your incipient program has been endorsed, for example, by several local ethnic groups, or will be conducted in conjunction with the local community college, or will teach music appreciation to underprivileged youngsters in the immediate vicinity of your plants—then you can establish and clarify relationships of the training programs to such affiliations and results that the organization *can* value as not only traditional civic participation, but also as being *organizational responsibility* in its best sense.

To summarize, be prepared to see all participants grow: the trainees, the trainers, the organization's top executives—and you, yourself. If you can see that your own growth will expand your horizons and make you more valuable to your present organization, why allow anyone else to deny that same interpretation on behalf of the trainees?

The day of the unthinking employee (who was expecting to do *everything* demanded and *only* what was demanded) is gone—fortunately. In his place is usually a responsible human being capable of making judgments and increasingly insistent on

participating in decisions which affect him. Participatory management is common in Europe; and it happened against the wishes of American firms' foreign subsidiaries. The Americans have been proved wrong. Sadly.

The KITA manager is wrong. The efficiency experts of only a few generations ago were wrong. The military mentality of "don't ask questions" is wrong everywhere else, too, including your business.

Most people have untapped potentialities. Your program is simply going to make what might be (for many) the very first tap. Don't be afraid of the results: all you're going to find is a wellspring of hope and gratitude. It's enough to do you proud. Be sure you do it justice!

Taking Bows:

Although some of the programs designed under the aegis of this book might relate to training internal to the company, the underlying assumption is that a considerable portion of any marketing decisions will relate to outside applications, either via your distribution channels or public/civic service.

It's not impossible that (after the initial results are in), you might want to announce them via paid advertising. Not every editor will be sympathetic to the ideas you've advanced, and the desultory nature of the press release might not suffice. A small additional investment in public awareness ads in highly selected papers or professional journals might be just the way to pique the interest of a group whose attention you'd like to have—financial brokers. The financial class could range from stock brokers and financial analysts to employment agencies to college graduating classes.

But capitalizing on a successful program is not necessarily limited to trumpeting your own praises. It could entail your developing complementary or totally different programs or more or less ambitious sequels or opening up the training process to self-identified prospects not previously considered.

If that should happen, you have an immediate choice: to remain involved to whatever degree you are at the time, or to disengage, or even to take charge of a new department, full time. It might not be an easy choice.

There is also the possibility that even with a single program, the company exceeds its expectations but feels that it has nothing new or worthwhile to offer at the moment. In that case, it might be a mistake to fake a new entry merely to respond to invitations. Consider how seldom Hollywood's "Part II" offerings approach the heightened expectations generated by the success of the original. If you really have nothing more to say, it's best if you don't prove it with a poor sequel.

As with all well-planned programs, you set yourself some goals. Have you reached them? Have you remained faithful to your budget, to your middlemen—to your trainees? Is there anything more to *prove?*

If you've gone out to do a specific job, once you've done it, stop! Knowing how to get out when it's time is just as important as knowing how to get in at the start. Moreover the confidence you will develop by demonstrating just how cleanly one can bracket the ISD process will allow you to disengage here without surrendering the right to begin again at the drop of a bright new idea!

Before you close the covers on your Master Syllabus or on this book, take inventory of what has been accomplished in your own world of management. It is virtually impossible that you could oversee the development of a major project without your self's growing.

So that you have a proper appreciation of what the project has given you, why not take a few minutes to jot down some of the gains you've made in specifics related to these five items:

First, you've gained forever a heightened ability to express your own ideas for training and support programs in terms that can be acted upon, and that's via a methodology that enables you to control the processes you set in motion. That's a prime management tool.

Second, you have gained an ability to look at both your company and its surroundings in terms of people and public service, rather than merely in marketing statistics.

Third, you will have gained access to countless individuals on a personal basis whose acquaintance you might never have made and whose trust and respect you might never have garnered. It's not possible to be too widely known, especially for having *given.*

Fourth, you've gained a mechanism that will help you to continue to grow in the future while helping others to grow.

Fifth, before it's all over, you will have gained new visibility and respect in the company, too, and in the marketplace for inventive ideas competently executed.

Now add a few more of the less obvious benefits you already recognize. And now that you can reach the goals you originally set, isn't it time to start thinking about new ones? After all, you have just begun assembling the new tools with which to achieve them!

AFTER WORD

By now you have probably decided that ISD is both wonderfully useful and worth an effort to learn, and we've referred to ISD as its own authority whenever it provides its own rationales and methodology. No one can approximate its dictates more succinctly. There is no gist to approximate. ISD is a complete, closed system! It must be operated in full in every instance. So any attempt to approximate would probably do more violence to the methodology than it would provide help to the reader.

If you are not skilled in ISD at the time of your first reading of this book (the premise of the book), either enlist the aid of an ISD specialist (by hire or by consulting contract) or go to a school (college or commercial) and learn it yourself. Better still, read and use *Common Sense ISD*, a self-contained how-to book. Whether or not you intend to do all the work yourself, "Faking it" is not tolerated by ISD. Nor by this author. But if you make an effort to learn more of ISD than this (or any) brief familiarization can give (we won't say "basics" because ISD is itself absolutely basic in the whole) you'll forever have a firm grip on programming for any need or any occasion. Would that capability help you to do your job even better? Bet on it!

Richard Cavalier

Glossary

(Hierarchical)

The GLOSSARY as assembled here approaches a learning hierarchy of your probable need to understand specific terms and relationships and should therefore represent a logical progression in needs and understanding. That's ISD in action!

Adequate: Sufficient to do the job required. Not a pejorative.

Job Description: An overall statement of the job's own aggregate functions, responsibilities, assignments, etc., listing specific duties. List all "must" pre-qualifications.

Duty: (In education, called a division.) A large segment of the job (or educational instruction area); often a cluster of related activities and tasks.

Task: A discrete element of learning, having finite starting and stopping points, that can be learned and/or performed within a relatively short time. This is the smallest meaningful or valuable skill item. Correctly stated, a task description begins with an action verb and a specific description of what is to be done/learned.

Task steps (sub-tasks or elements): Very small but specific actions or knowledge items which individually have little value or meaning but in combination form the task under instruction. Erasing, winding paper, and centering paper can be some of the task steps under the task of typing. For clarity, this text refers to "elements" *or* "steps."

Motion (movement) studies or mental processes: The simplest portions of a task step/element. Not appropriate for your study except where precision of minute details is critical.

Needs assessment: The determination, made against actual job performance, of what must be done/taught in a given program or course or segment.

Inventory of tasks: A list of selected and appropriately categorized tasks (as cognitive/dexterity/affective state) and as performed in the given job/task instruction area. Decisions must be based on direct observation of skilled performance, not merely on theory. Sometimes called a simple statement of objectives. It is NOT complete for training purposes.

Complete Statement of Objectives: A specific statement of what the learner will be doing, under what conditions or constraints, and to what given proficiency level when he demonstrates his new competence/learning. The proper CSO must be stated in do-able terms, or action verbs. Such unspecific or subjective terms as "more" or "better" or "improved," etc., are NOT acceptable in any proper CSO. What percentage better? And when, than on what date? On graduation, or in the field. After six months? What constitutes/measures "perfect" if required? What level of learning is acceptable if not perfection?

Performance objective: What the trainee must be able to do or demonstrate on completion of training.

Terminal behavior: The desired end result in performance or behavior.

Terminal Objective: The ultimate goal of the program or program segment. State specifics in CSO terms.

Enabling behavior: Contributing subordinate skills indispensable to the achievement of the desired terminal behavior. You must have (a specified) strength to peddle before learning to ride a bicycle, although peddling might not be not practiced in class.

Entry behavior: Performance characteristics common to training candidates; can be positive (as prerequisites) or negative (undesirable habits requiring retraining or other correction).

Prerequisites: What the trainee must know or be able to do or demonstrate in advance of the training course in order to be successful in the given course.

Instructional analysis: The identification of the essential content to be included in a designated instructional sequence (or course) by identifying important and relevant duties, as well as the specific tasks that comprise those duties.

Audit: The determination, made against the actual job performance, of whether the given program is actually doing what should be done. In the military, an audit is known as the Report of External Evaluation Findings (REEF).

Instructional Systems Development: A methodology for assuring that training requirements are relevant to—by strict derivation from—the job requirements. (Superior!)

Instructional delivery system: Any combination of presentation techniques (including live instruction, classroom materials, audio/visual media, etc.) that help fulfill requirements of the types of learning. In ISD, this is accomplished with the appropriate items among 12 paired algorithms (provided in most ISD) of learning task characteristics.

Algorithm: A matrix for pre-selecting logical options or choices based on job/needs characteristics.

Iterative development: Repeated testing and adjustment or refinement of plans and routines during developmental stages until performance objectives are met. Intrinsic in ISD.

Practice: Repetition or rehearsal of the cognitive or dexterity (motor) skill being learned.

Iterative practice: Repeated practice as a training tool, it leads to over learning, which in turn contributes to facility of performance and long-term memory.

Strategic practice: Placement of the practice sessions exactly where they should occur in the presentation of information; that is, no further information NOT related to the given skill being practiced is allowed to intervene.

Hierarchy: The diagrammatic representation of relationships or enabling behaviors or task elements to the job's terminal behaviors.

Jury of Experts (or Content Experts): Competent performers of the existing jobs and tasks under study. Otherwise, experts in the theory/practice areas in which any future job will operate.

Proficiency level: As previously described, the degree of skill proficiency required: absolute mastery or practical command or general familiarization.

Pre-test: Any means of measuring current cognitive, dexterity, or attitudinal/affective state levels prior to any training. Often a confirmation of prerequisite skills needed. Sometimes a true exploratory test to gauge actual skills.

Post-test: The measurement of actual job performance to pre-established criteria on completion of the prescribed training course. Actual demonstrations are preferable to pen-and-paper tests.

Domains of learning: The specific categorization of training sequences as predominantly cognitive (knowledge) skills or dexterity (manipulative/motor) skills or affective (attitudinal) states or mental sets.

Norm referencing: Comparison of the learner's performance to that of other people, via a grading system, such as the bell curve, percentages, etc.

Criterion referencing: Comparison of the learner's performance to an absolute standard, usually the job itself. This is sometimes called performance-based instruction or precision teaching.

Module: Any cohesive, self-contained unit of education or training material(s) fulfilling a stated objective.

Richard Cavalier

Glossary

(Alphabetical)

The GLOSSARY as assembled here is an alphabetized approach to a learning hierarchy and your need to understand specific terms and relationships. If you lack the patience to search by ISD segment, then the alphabet is the reliable old form.

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Algorithm: A matrix for pre-selecting logical options or choices based on job/needs characteristics.

Audit: The determination, made against the actual job performance, of whether the given program is actually doing what should be done. In the military, an audit is known as the Report of External Evaluations Findings (REEF).

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Entry behavior: Performance characteristics common to training candidates; can be positive (as prerequisites) or negative (undesirable habits required retraining or other correction).

Hierarchy: The diagrammatic representation of relationships or enabling behaviors or task elements to the job's terminal behavior(s).

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Iterative development: Repeated testing and adjustment or refinement of plans and routines during developmental stages until performance objectives are met. Intrinsic in ISD.

Iterative practice: Repeated practice as a training tool, it leads to over learning, which in turn contributes to facility of performance and long-term memory.

Job description: An overall statement of the job's own aggregate functions, responsibilities, assignments, etc., listing specific duties. List all "must" pre-qualifications.

Jury of experts: (or Content Experts): Competent performer of the existing jobs and tasks under study. Otherwise, experts in the theory/practice areas in which any future job will operate.

Module: Any cohesive, self-contained unit of education or training material(s) fulfilling a stated objective.

Motion (movement) studies or mental processes: The simplest portions of a task step/element. Not appropriate for your study except where precision of minute details is critical.

Needs assessment: The determination, made against actual job performance, of what must be done/taught in a given program or course or segment.

Norm referencing: Comparison of the learner's performance to that of other people, via a grading system, such as the bell curve, percentages, etc.

Performance objective: What the trainee must be able to do or demonstrate on completion of training.

Post test: The measurement of actual job performance to pre-established criteria on completion of the prescribed training course. Actual demonstrations are preferable to pen-and-paper tests.

Practice: Repetition or rehearsal of the cognitive or dexterity (motor) skill being learned.

Pre-requisites: What the trainee must know or be able to do or demonstrate in advance of the training course in order to be successful in the given course.

Pre-test: Any means of measuring current cognitive, dexterity, or attitudinal/affective state levels prior to any training. Often a confirmation of prerequisite skills needed. Sometimes a true exploratory test to gauge actual skills.

Proficiency level: As previously described, the degree of skill proficiency required: absolute mastery or practical command or general familiarization.

Strategic practice: Placement of the practice sessions exactly where they should occur in the presentation of information;

that is, no further information NOT related to the given skill being practiced is allowed to intervene.

Task: A discrete element of learning, having finite starting and stopping points, that can be learned and/or performed within a relatively short time. This is the smallest meaningful or valuable skill item. Correctly stated, a task description begins with an action verb and a specific description of what is to be done/learned.

Task steps (sub-tasks or elements): Very small but specific actions or knowledge items which individually have little value or meaning but in combination form the task under instruction. Erasing, winding paper, and centering paper can be some of the task steps under the task of typing.

Terminal behavior: The desired end result in performance or behavior. Always measured: must be observable, measurable, and verifiable.

Terminal Objective: The ultimate goal of the program or program segment. State specifics in CSO terms.

Richard Cavalier

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Note: Titles cited tend to be seminal works especially notable in
the context in which mentioned. Some authors have written
other books worthy of attention, as have still others
unnamed.

Notice the many titles from previous decades: there have since
been no significant, applicable new discoveries related to training
(considered separately from new *proofs*) in the scientific fields since
the early 1980s. Most of those that this author previously thought
significant were listed in the bibliography of his 1973 book, *Achieving
Objectives in Meetings*, and in his 1983 (updated 2002) book, *Sales
Meetings That Work.* To review excerpts from printed comments
regarding publication of *Achieving Objectives in Meetings*, see our web
site: *www.meetingsCavalier.com.* There's also additional background
on recent proofs for the group communications industry in the materials
of M. David Merrill, listed below.

For corroboration, see *Training* Magazine for February, 1999,
(cover story: "Learning Curve"); and June, 1998, (medium vs message:
"Wake Up"). Among 15 experts quoted, Fred Nickolson, the head of
strategic planning at Educational Testing Service, in Princeton, NJ,
could not answer *yes* to new learning after 1983, although he
specifically noted that there's been nothing new "in thousands of years"
and also that there's been no new "understanding of adult education" in
that time. He also noted that a then-boomed pedagogical book suggests
that "learning is whatever it is that tests measure." You can have
confidence in the unorthodox concepts and viewpoints presented in this
book.

Further, a Los Angeles Times article in the "Work Place" section
for April 15, 2001, quoted a half dozen experts (consultants) regarding
meetings...and the issues identified in most of those "expert" opinions
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probably originated in) our 1970 (and later) publications: this author's
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Richard Cavalier

INTRODUCTION TO THE SECOND (SCAN) EDITION

Prior to 1960, the meetings field was disjointed and dependent on individual management methods, whether valid and complete or not. In 1960, two national associations—clients of banquet-entertainment producer United Attractions, Inc, Chicago, asked for business stage service, because such service was available from other stage producers only in conjunction with a dog-and-pony show--not appropriate. So the initial professionalizing effort of the business-meetings market was launched.

This author was a co-originator of that function and editing and visualizing convention lectern scripts with simple supports, on screen. At that time, visuals in business meetings were considered to be extraneous. Association members approved; both associations continued in future years; other associations joined; and corporate members began to use United's service: initially termed "Meetings Coordination" because all associations already had a Meetings Manager—the persons charged must cooperate, not compete for primacy. The on-site production of most large central meetings is not a one-person job.

Jay Lurye was also a co-originator at United, taking charge of the physical production of all meeting rooms' production needs. Lurye also called the field's first conference for meeting planners: World Meeting Planners Conference, in the 1970-71 season, in Chicago. Surprise: There was still no organized meeting planner group . . . virtually all participants were secretaries of company meeting-callers and were expected to organize the meeting in their 'spare time.' Now a full-time job?

Most company Trainers use a rule-of-thumb for estimating advance time requirement for any program: One day's applied time for each hour of programming (IRS: 6 hours daily min), or about one week per day; and about one month's applied time for each full week. At your company, how many hours are programmed for large central programs? Because business meetings and training programs are designed for individual learning, not crowd size, the advance time requirement remains relatively standard. Curiously, both the lectern material and training portions respond to the same requirements.

In 1972, and likely having 'borrowed' Lurye's attendance list, a group of purveyors announced its own meeting planner association intended to enlist company meeting planner membership. Purveyors have outnumbered members at probably all such associations. Originally, purveyors seemed to defer to the wishes/needs of the company-user members; however, in the "late 1970s" (McGraw Hill) the name of the second and still-largest meeting planner association had been changed, and purveyors got full voting rights—and took control! Purveyors can out-vote client companies and set direction? Ethical?

That's this Author's qualified overview of the circumstances and issues of the meeting planner business . . . some problems known from the start have not yet been adequately addressed, because the better alternative is not necessarily a salable product. Cavalier's books have presented the alternatives before they were recognized as needed . . . and thee books will service you still.

Author's overview of the issues of the commercialized meeting planning industry (distinct from

Enclosed are scans of books have been out-of-print for decades. The two earliest ("Achieving objectives in Meetings"; 1973; Corporate Movement) and "Dow Jones-Irwin's updated/expanded version ("Sales Meetings That Work") were in in print prior to the arrival of the web; so quick out-of-print condition for both meant sales death. At that time, all published material was

subject to the wishes of the editor of each publication. Attempted reprints have been derailed by an unrelated campaign of personal harassment. Conclusion, if the paper versions will be published for companies whose meeting planner organizations don't recognize them, why print paper? Therefore, this scan edition for meeting-callers who want to see the starts, how-to forms, and benefits of a system-and then alert their programming fulfilment associates—from Agenda development to presentation on stage or in training session.

Because there was no organized meetings field at the time of the first publication and a decidedly- disinterested, purveyor-dominated meetings industry by the time of the web. Unfortunately, the first book was ahead of its time; further damaged when its publisher went out of business within about six months after publishing. So the technical forms and information were out and borrowed, but the book was unavailable. A decade later, re: "SMTW," purveyor complaints helped to put the DJI book out-of-print, soon, although the initial royalty was nearly $1,000. Clearly, there was company interest in the book—but not in the commercialized meetings associations.

Yes, "AOM" is five decades old . . .and that's precisely it's value. "AOM" demonstrates that at the time of publication, the entire company-meetings field was unfocused and functioned on personal methods, whether complete or not; or good or bad.

So, here is the suite of business-meetings books, in order of creation--they should together cover all needs for key types of meetings for most meeting-callers, proving guidance for meeting-callers plus specifics for staff fulfillment persons.

"Achieving Objectives in Meetings":

This Author's first book, "Achieving Objectives in Meetings" ("AOM)" was the nation's (world's?) first complete system for managing the entire program-planning job, from inception to presentation. All previous books could present worthwhile information, but much was unusable because it was delivered as discursive observations ("Be sure to . . .") but not in how-to formats. Specific tips needed cut-and-paste into the readers' own methods, which might or might not have been adequate. Ultimately, multi-author books became popular; yet, the multiple authors' writings did not operate together as a system and, sometimes, masked general compatibility of ideas because of different terms for similar concepts.

 "AOM" contained the world's first PERT Diagram for visualized and calendarized control of the entire meeting management process, directly related to discussion and instructions in preceding chapters! Some of "AOM's" content included his previously-published magazine articles, which were always valid because of his six years' hands-on experience at United . . . but gathered strength when combined into a system. The discussion of visuals relied at that time on slides and filmstrips, which were long-ago improved. But the ubiquitous presence of cellphone photos tends to cloud some meetings with sometimes-irrelevant entertainment—the worst example of which is the 'Spectacular!' visual blitz in large business meetings! Google 'Dr. Malcolm Knowles' for his early take on distractions and entertainment-values in programs.

General complaint: No index! Advantage: So many terms were repeated so often in different contexts that a traditional word-Index was a waste of tracing time for users. Yet, the book is organized

by concept, and if you know what you're trying to find, you can easily find that unit by title and/or concept.

The world's best general Instructional Systems Development System (I-S-D) system was its PERT (Performance Early Review Technique) system, created in the 1950s to control the development of the Polaris Submarine—and so can probably handle your meetings needs. It is more complete and more demanding than "AOM" but not directly usable by most meeting-callers, although by some company Trainers. In essence, PERT is the reverse engineering of a concept. Any attempt is valid, although not necessarily complete and or flawless without the Navy's ability to test over hundred hundreds of posts and millions of trainees. Discussion and 'translated' format, below. It's wise not to buy a disk version except by prior approval by an ISD specialist.

"Sales Meetings That Work"

If there was no ready-made professional-planner audience for "AOM," there was still a huge proportion of involved persons who could not relate to the relatively unfamiliar terminology of that book. So, the Dow Jones-Irwin expansion was written in a more user-friendly manner—more useful explanation for performing the requested actions. All forms from "AOM" were repeated, together with brand new forms and thought-guides that expanded the available helps for neophytes. Even the original PERT Diagram was slightly adjusted, to reflect user comments.

However, this authority's telling of unwanted truths apparently offended advertisers at both the DJ-I publishing house and the ad-supported industry magazines. Despite large original sales (first royalty payments: nearly $1,000), unsold copies of SMTW" were 'lost' in inventory. Not reprinted by DJ-I-- ostensibly because of unusable ad-copy created on request, this writer is not an ad copy-writer. Moreover, my editor was released. He started his own publishing company, which DJ-I purchased. So, my editor was back at DJ-I but, officially, not on its payroll—only a legacy from a purchased company. Moot point—DJ-I no longer publishes books.

By using "SMTW" as a guide, anyone who is calling a meeting can make the first attempt work in a program that Achieves his/her Objectives. In the hands of your fulfillment associate, it can make your wishes understood and delivered. Over time, "SMTW" will make the planning process a quick check validator for both.

"Common Sense ISD" ("CS-ISD")

As mentioned above (at "AOM,") the US Navy's PERT system is superior and was probably the world's finest. It has never been disparaged or superseded, although numerous proprietary versions now exist, some taught by colleges and some bought on computer disk. College courses are probably similar, but some/most of the disk versions have been 'simplified,' reducing their demands for facts and stats and specifics—no approximations or guesswork is tolerated by the Navy's original.

Minor problem: They Navy guarantees that its PERT will be fool-proof and provide a valid and workable system on first use IF all of its demands are honestly fulfilled. Big IF! By 'simplifying,' various

discs might permit approximations or eliminate some steps of the original—thereby negating the fool-proof aspect and introducing errors that cannot be traced—until problems show during the first egg-on-face first usage. Worse, the basic problem might still not be located and fixed. So, re-make—simplified?

"CS-ISD" is not a 'version' of the Navy's ISD—rather, it is a 'translation' from military jargon into standard business-ese . . .while eliminating the military's need for complex control numbers that identify programs at hundreds of ports across the world. Not needlessly fancy: In the 1950s, mimeographing was the standard non-book replicator, and "CS-ISD" has photocopied some of the mimeographed pages, with a clean-type duplicate, facing. If sailors can learn from mimeograph, your people learn from clean e-print, because content, not format, is the determiner of quality.

Mini-problem: Because of ISD's complexity, and unless you are a savvy trainer--this book's Author does not recommend the solo use of even his own book for a first-time attempt. Conceivably, it can work. 'Conceivably' is not compatible with ISD. Instead, check with the company's Training Department to discover whether any of its current staff might be familiar with any military service's ISD. (Quietly, because the TD might not use ISD methods and forbids its use.) The Navy's ISD was an all-services contest winner; but any ISD specialist will be comfortable with any other military version. If no ISD specialist is on staff, place a small add in the help-wanted column of a city or regional newspaper offering a one-time-project gig for a military-trained ISD specialist. Most discharged ISD specialists gravitate to business centers, but some live near isolated companies; retirees could live anywhere. Most might welcome extra income.

Overall plan: Your own job during the gig-period of program management is to hope-for in-house service so you can look over the shoulder of your ISD specialist—not every minute, but to review the preparation of each individual Step in every Phase of the ISD process. If he/she is employed, arrange for off-hours.

ISD is probably the ultimate do-it-yourself-system. So, once you have understood a specialist's reasons and choices, the "CS-ISD" book itself will be your permanent guide for using ISD for all programming in the future, if you choose. Nothing but expense prevents you from re-hiring your ISD specialist as often as you choose. When comparing costs, remember that it's fees-paid vs the lost opportunity of a failed program. As already mentioned, for learning requirements, the same methods are usable for the planning of both meeting Agendas and training sessions.

You can create perfect programs that function as planned—on their first use. Why not start now?

"Managing Through Training" ("MTT")

If you were promoted into a supervisory position, such as department head, without adequate advance training, join the millions. Or, rather, refuse to join the millions!

You've just been shown that ISD, a valid and fool-proof system for communicating with your subordinates and others is available, and that you shouldn't try to cut your teeth on it. So, "MTT" will help you to understand the difference between telling your people to do something and enabling them to do something properly and as expected.

Studies have shown for decades that most people want to cooperate on the job, but you still need to make their cooperation possible with specific requests and/or training. Moreover, the same studies show that dissatisfaction with the quality of supervision is a most-common problem. Because it is concerned with the human side of this supervisory equation, "MTT" is a logical starting point for your understanding of what your subordinates and associates must understand before they can perform to your specifications—not just 'wants.'

This is not a technical book of "thou shalts." Rather, is it a logical appraisal of the most seasoned methods of getting people to see and accept your objectives and suggested methods. In short, it talks about letting your personal style be displayed in ways that improve the subordinates' own performance.

Nothing Is required except your application of the new supervisory understandings and concepts that you develop while reading. In other words, this is not a read-and-forget book. It can be a read-and-be-glad-you-read-it book that you can pass-along to other newly-promoted but untrained peers.

In short, you can become the kind of supervisor that you wish you'd had more of. Just try!

END

AFTERWORD

No primer, including this book, will ever make you an instant expert in anything. However, the topic of this book can be learned: The proper development of the agenda (proper fulfillment of the agenda's specific program and objectives) until the delivery of the finished program (training class or meeting). "Managing Through Training" ("MTT") will set you, as a neophyte, on the path to programming competence.

The very best tool for your control of the program development process is the program development system created by each branch of the military, known as "I-S-D" or "Instructional Systems Development." The US Navy's ISD and PERT Diagram and algorithms included here will work splendidly to channel your efforts. Don't let the web's misuse of algorithms-as-sales-pitch sour you on their use—these ISD programs really work!

The ISD contest among those services was won by the U.S. Navy, whose original program was meticulously honored by this writer when converting the Navy's version from military-ese into the common business language. This writer consulted personally with the winning team's Chief of the Training Command at Great Lakes Naval Training Center (outside Chicago) before writing his "Common Sense ISD ("CS-ISD").

With more than 800 military posts across the world, the military's demand for numbers and related control mechanisms likely has no useful relationship to most public or private-business needs. So, index-control numbers are reduced, here. Individual steps that have been 'translated' have not changed their purpose or thrust. ISD is not easy; but honor all of its explicit demands—always—because it works—always!

The military's need for programming specialists and their turnover also required the develop- ment of a traditional course for those specialists at 800 posts. It requires six weeks of 40 hours each . . . probably more time than you can devote now. That program was once offered to business executives but was discontinued. The reason given at the time was lack of company interest. Not so; it was a lack of executive need to learn a program that they, themselves, would not operate. The better target was the corporate Training Department, which already functions specifically for purposes served best by ISD.

ISD is, in essence, the reverse engineering of a concept—your concept for your incipient program. That requires intelligent work by you. Any approach to reverse engineering that achieves the same objective is equally valid (although not necessarily as complete and foolproof as is the Navy version) IF ISD's demanding dictates are honored. Guesswork will negate the 'foolproof' aspect.

Many colleges teach their own versions of ISD; you can inquire to determine whether classes are available conveniently. However, many proprietary versions (some on disc) 'simplify' by

eliminating or easing some demands, which thereby negates the 'foolproof' aspect. Guesswork can create problems not discoverable until the problem shows itself in the training room or meeting. Don't play games with ISD! If you choose to buy a disc, be sure that an ISD-competent person assists you in choosing among those discs' various strengths and weaknesses.

In decades past, ISD was bad-mouthed by a training magazine in the meetings field, with the dismissal, "There's no there, there." Is a workable and foolproof program every time a significant 'there'?

Result: A firestorm of protests from reader-users required a retraction, which acknowledged the reader-users' beliefs that "If there's a failure, blame the [company's] program designer, not the ISD system." Suitable endorsement?

That magazine then developed a peer-review system, because a few somebodys were mis-leading various editors about many topics. So, the various meeting-industry magazines could be serving interests other than yours. Hard to believe? Check that initial challenge to ISD and its result in "Training" magazine. The articles' titles: "Attack on ISD" (April, 2000) plus its retraction, "A Hard Look at ISD" (February, 2002). Database: Gale's General One file. Caveat emptor!

This book, "Managing Through Training" is the primer for our ISD-companion book, entitled "Common Sense ISD: Instructional Systems Development for Non-Trainer Managers. MTT's purpose: To help you to understand the human as well as technical aspects of the training discipline, as presented via ISD. As a Navy-reboot, "CS-ISD" can help you to become a programming expert. Even so, it's a tough job to work alone from books, although it can probably be done. If you have options (as below) don't begin with ISD while unaided.

Best alternative: Get help from a military ISD-expert trainer. How? Ask or advertise. Most younger-discharged ISD-experts are already working in the corporate programming field, as consultants, alone or with consulting companies. Most are usually found in industrial areas. Retired military specialists might be living anywhere, and some will be glad to get a short-term gig or two or five. Still others might now be local corporate Training Directors who are willing to moonlight for non-competitive companies.

A brief business ad in your regional papers should get responses. Curiously, some TDs who don't understand ISD refuse to let their military-trained associates use it. Problem: Their "Let's try this . . . or that" guesswork is all they know. It's perpetual grasping at anchorless 'good ideas.' ISD demands facts.

What should your newly-hired specialist do? Walk you through his/her preparation of the entire development process. Your objective is then to learn as much as possible each of the Five Phases and dozens of Steps programmed for ISD. No, you do not want that consultant to take your project home and deliver a finished package: Learn!

The value of "CS-ISD" is simply that it will be the textbook for your ISD-development process.

Because all of the military programs are essentially similar, your ISD-specialist will recognize, in the business terminology, the generic processes in his/her branch's version. 'Translation' problems should not occur or will be easily solved in terms of your specific needs at any given point.

Once you have been coached (directly or over-his/her-shoulder) you will be able to repeat the development process alone, in the future, if you choose. "CS-ISD"is your perennial cheat-sheet. If you have a good rapport with your ISD-specialist, make any deal that works for both sides.

In the last analysis, the purpose of "CS-ISD" is to prepare you in business terms and examples to use it, together with your ISD coach and/or "CS-ISD," as the textbook and permanent reminder of a traditional, dependable, and world-proved process. Attention applied to your first working with a consultant should make ISD your own dependable process. Forever!

When you look back on what you have been able to accomplish in program development, you'll be both pleased and proud.

This writer would then like to say, "I told you so!"

<center>END</center>

Managing Through Training is an Introduction to Formal Training for those Managers who have no (or insufficient) knowledge of the training topic. It's a primer for those who want additional background in either group communications methods or the techniques of formal ISD– Instructional Systems Development, as proved by the military.

Imitate me has been the training mode of the world for the hundreds of thousands of years that humankind has been around and will serve adequately for a longer time if Managers can be persuaded to *emphasize the training message*, rather than to accept the overly-expensive programming fads and equipment now blandished in place of message!

This book will deliver a solid grounding in training concepts, staff management techniques via training, and marketing opportunities that will permit you to make better use of the author's advanced books, *Sales Meetings That Work*, regarding management control of meetings; and *Common Sense ISD*, which presents a complete, step-by-step method of controlling the development of all your training needs, whatever their nature or sophistication, to fulfill the ideas and potentialities of this book.

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