TD: Talent Development

ISSN 2374-0663

Vol. 74 Issue 5 - 2020

- **Agility at Its Peak.**

By: St. Gerard, Vanessa. , p6-6. 1p. 1 Color Photograph.

In the cover story, author Michael Wilkinson presents five closing activities facilitators can use to end their training courses in an engaging and meaningful way. The second theme article, by Se...

Subjects: HOME labor; MOTOR ability

- **Manufactured Gender Diversity.**

By: STERNBERG, HANNAH. , p9-9. 1/2p.

You've heard the story: A company adds gender diversity to its list of priorities. Yet, despite everyone's best intentions, they're dismayed to discover that year-over-year gender representation ...

Subjects: GENDER; CAREER development; WOMEN executives; Vocational Rehabilitation Services; Professional and Management Development Training

- **Use the Familiar to Attain Sustained Change.**

, p9-9. 1/2p.

PRACTICAL POINTERS If you're facing organizational performance issues well beyond training courses, look no further than the staple instructional design model ADDIE. The steps - analysis, design,...

Subjects: LEADERSHIP training; METHODS engineering

- **Not All Learning Videos Are Created Equally.**

By: BOSSOV, AVRA. , p10-11. 2p. 1 Illustration.

Learning videos provide a cost-effective and scalable way for companies to train employees. In its sixth annual State of Video in the Enterprise study, Kaltura found that 91 percent of the 1,200 ...

Subjects: VIDEOS; VIRTUAL classrooms; Video recording merchant wholesalers; Audio and Video Equipment Manufacturing; Motion Picture and Video Production

- **Niche Roles Pay.**

, p11-11. 1/3p. 1 Illustration.

FAST FACT 5% That's the amount that employees who perform specialized tasks earn over their colleagues with the same title at the same organization. SOURCE: "JOB TURF OR VARIETY: TASK STRUCTURE A...

Subjects: WAGES; ORGANIZATIONAL structure

- **Empower Data Literacy.**

By: BLANCHARD, ELIZA. , p12-13. 2p. 1 Color Photograph.

The research found a significant gap between the perceived importance of data and employees' data-oriented skill sets. That includes setting clear expectations around the role data should play in...

Subjects: LITERACY; JOB stress

- **OBS Studio.**

, p13-13. 1/3p.

COOL TOOL Whether it's for broadcasting a training session throughout your organization, making tutorials, or giving people a tool to help them create user-generated content, easy-to-use video so...

Subjects: LINUX operating systems; FREEWARE (Computer software)

- **Belonging.**

, p14-14. 1/2p. 1 Color Photograph.

WORD WITZ Should work be a place where people feel included, or should they feel like they belong? That question - and the difference between inclusion and belonging - has grown increasingly infl...

Subjects: DIVERSITY in the workplace; WORK environment

- **Three Big Points.**

, p14-14. 1/2p. 1 Illustration.

OFF THE WIRE Here's the deal: Give 10 minutes of your time and get three big takeaways regarding a major issue affecting companies and people around the world. In that part of the episode, Michel...

Subjects: TECHNOLOGICAL innovations

- **Make Your Financials Transparent.**

, p15-15. 1/2p. 1 Graph.

Employees expressed their level of interest in their company's financial performance. GRAPH: Make Your Financials Transparent.

Subjects: FINANCIAL performance; RESOURCE management

- **Insurance Company Investing Millions to Upskill and Reskill Workers.**

, p15-15. 1/2p.

INNOVATIONS Nationwide Mutual Insurance Company is committing $160 million over five years toward Future of Work, a new reskilling and upskilling program. The company has also incorporated increa...

Subjects: INSURANCE companies; Insurance Agencies and Brokerages; Direct Health and Medical Insurance Carriers; Other Direct Insurance (except Life, Health, and Medical) Carriers; Direct group life, health and medical insurance carriers

- **Recognize and Reward.**

By: ROBINSON, SHAUNA. , p16-17. 2p. 1 Color Photograph.

NOW YOU KNOW Nearly all organizations have a performance management process - but not many employees think it's working. The Association for Talent Development's research report Performance Manag...

Subjects: CHIEF learning officers; PERFORMANCE management

- **Align Learning and Strategy.**

By: GITHENS, ROD; HERD, ANN. , p18-18. 1p.

Research 1 in 3 employees sees no strategic value in their learning. Merely knowing about the available learning opportunities affected employee perceptions of having a positive learning culture,...

Subjects: LEARNING strategies; CAREER development; ORGANIZATIONAL learning; INDUSTRIAL relations; CORPORATE culture; Professional and Management Development Training; Vocational Rehabilitation Services

- **Tap Teammates for Training Tools.**

By: PARTRIDGE, LISA. , p20-21. 2p.

Success with less LIFELONG LEARNING You have a team of trainers who would love to connect more, bounce ideas around, and learn some new techniques to include in their workshops. To give the train...

Subjects: ACTIVE learning; DIGITAL sound recording; WAVE analysis; ADULT education workshops; Sound Recording Studios

- **Create Opportunities for Coaching.**

By: ANDERSON, DIANNA. , p22-24. 3p. 1 Color Photograph.

Fundamentals COLLABORATION AND LEADERSHIP Is becoming a better coaching-based leader at the top of your career to-do list? Coaching as a means to learning What you believe coaching is will limit ...

Subjects: BEHAVIOR; OPEN learning

- **A Workforce That Spans the Spectrum.**

By: ELLIS, RYANN K. , p25-27. 3p.

Trends TALENT STRATEGY AND MANAGEMENT Successful organizations recognize the significance a diverse workforce has on productivity and profits. Managing and understanding factors such as eye conta...

Subjects: ASPERGER'S syndrome

- **IT'S A WRAP.**

By: WILKINSON, MICHAEL. , p28-31. 4p. 1 Color Photograph.

TRAINING DELIVERY AND FACILITATION IMAGINE THIS: You have had a great training session. The elevator speech The purpose of this activity is for participants to develop a brief statement that summ...

Subjects: VIRTUAL classrooms; CLASSROOM environment

- **PAIR UP.**

By: MCLEAN, SEAN; SIDEBOTTOM, TOM. , p32-35. 4p. 2 Color Photographs.

TRAINING DELIVERY AND FACILITATION Have you ever been to a concert where the artists seamlessly switch off to riff? Co-facilitation or co-teaching seems like a solution for so many class challeng...

Subjects: TENNIS tournaments; DISCOURSE markers

- **Building Trust in Uncertain Times.**

By: WASHINGTON, TRACY Y. , p36-41. 6p. 3 Color Photographs.

While most managers trust that technology will transform operations to be more efficient, creating that same trust with team members is not quite as simple. So, if you're a manager who desires to...

Subjects: BEHAVIOR; TRUST; BUSINESS success; HELPING behavior; MARKETING executives

- **A SALES ENABLEMENT BLUEPRINT FOR SUCCESS.**

By: SIECK, WHITNEY. , p42-47. 6p. 2 Illustrations, 3 Diagrams.

Depending on a company's business culture, the analysis phase can be as informal (a quick conversation with sales leaders) or formal (requiring sales leaders to complete an intake form) as needed...

Subjects: CROSS-functional teams; TEAM building; BUSINESS partnerships

- **Beware of Faulty Filters in Your Hunt for Talent.**

By: KAYE, BEVERLY; BENTLEY, CONNIE; ROGERS, LINDA. , p48-53. 6p. 1 Color Photograph.

TALENT STRATEGY AND MANAGEMENT Horace is driving a decrepit old car through a rural area. Because Horace's filters are similar to the ones that can cause leaders to set inaccurate job requirement...

Subjects: ABILITY; FILTERS & filtration

- **Differentiating Customer Education From Talent Development.**

By: AVRAMESCU, ADAM; DERINGTON, DAVE. , p54-58. 5p. 3 Illustrations.

MY CAREER As the field of customer education emerges alongside fast-moving SaaS businesses and technology companies, talent development professionals find themselves exploring careers in the fiel...

Subjects: TALENT development

- **Embracing a Coaching Culture.**

By: THOMPSON, DERRICK. , p60-61. 2p.

SPECIAL AD SECTION Leadership development is a rising priority for organizations, as evidenced by findings in the Brandon Hall Group's latest Impact of Leadership Development Study. According to ...

Subjects: CULTURE; BUSINESSPEOPLE; PERSONAL coaching; LISTENING skills; All Other Personal Services

- **Take Control of Your Work.**

By: THOMAS, MAURA NEVEL. , p62-64. 3p.

A workflow management system is not an app or a piece of software. The calendar and the task app are the tools, but the habits for using them are the workflow management system. Workflow Manageme...

Subjects: WORKFLOW management systems; BEHAVIOR; WORKFLOW management; WORKFLOW

- **Reframe Your View for Better Solutions.**

By: ALLEN, NICK. , p66-66. 1p. 1 Color Photograph.

Books Harvard Business Review Press, 232 pp., $25.99 REVIEWED BY NICK ALLEN At first glance, What's Your Problem? From the beginning, the author challenges readers to brainstorm a professional an...

Subjects: CRITICAL thinking; PROBLEM solving; BUSINESS consultants; HAND sanitizers; Other Management Consulting Services; Other management consulting services; Administrative Management and General Management Consulting Services; Process, Physical Distribution, and Logistics Consulting Services; Soap and Other Detergent Manufacturing

- **Multipliers: How the Best Leaders Make Everyone Smarter.**

By: Avramescu, Adam. , p68-68. 1/6p.

When I think about how I want to show up as a leader to my team, I think about how I can serve as a "multiplier" who attracts, empowers, and develops talent. This book provides a solid overview o...

Subjects: LEADERS; BIRD watchers

- **Feedback (and Other Dirty Words): Why We Fear It, How to Fix It.**

By: Kaye, Beverly. , p68-68. 1/6p.

I needed some new insights to share with a very sophisticated group about feedback. - Beverly Kaye "The root of feedback's branding problems lies in the way we're thinking about it and experienci...

Subjects: OBSCENE words

- **The Advantage: Why Organizational Health Trumps Everything Else in Business.**

By: Sieck, Whitney. , p68-68. 1/6p.

From a business strategy standpoint, nothing beats a Lencioni work. I love the actionable nature of the content created by the Table Group.

Subjects: BUSINESS planning

- **Don't Take Yes for an Answer.**

, p68-68. 1/5p.

To have connectability, he points to three communication strategies: authority, warmth, and energy. The author advises readers to stop accepting praise and instead push for honesty and the critic...

Subjects: COMMUNICATION strategies; AUTHOR-reader relationships

- **Curating Your Life: Ending the Struggle for Work-Life Balance.**

, p68-68. 1/5p.

Gail Golden Rowan & Littlefield, 176 pp., $30 Achieving work-life balance can be challenging. But Golden, who has 25 years of experience as a psychologist and 15 years as an executive coach, says...

Subjects: WORK-life balance; STRUGGLE; EXECUTIVE coaching

- **Facilitating Organizational Fit.**

By: MÁRQUEZ, RUTH. , p70-71. 2p.

Learning blueprint TALENT STRATEGY AND MANAGEMENT If a company assesses for organizational fit during the interview process, then new hires will presumably well represent the company culture. Whe...

Subjects: EMPLOYEE rights; CAREER development; NEW employees; JOB satisfaction; WORK environment; Vocational Rehabilitation Services; Professional and Management Development Training

- **5 Ways to Hone Customer Service Skills.**

, p72-72. 1p. 1 Color Photograph.

Quick tips During times of uncertainty, sharp customer service skills - especially empathy and compassion - become even more important. Exhibit these behaviors in your interactions with customers...

Subjects: CUSTOMER services; ABILITY

PHOTO | BEY BELLO

Agility at Its Peak

As I write this, I'm seated at what's become my new workspace—the dining room table in my home—which isn't comparable to my office at the ATD headquarters, but it'll do. Like many of you all over the world, the magazine team and I (and all other ATD staff for that matter) have been working from home for the past month or so. The transition happened rather abruptly, but admittedly, it also has turned out to be a smooth one.

More frequent instant messages, the introduction of video calls, and managing employees from afar have been among the main changes. Otherwise, though, it's been business as usual to ensure we bring you relevant content to help you do your job better.

So, let's get to it. This month's theme is training delivery and facilitation. In the cover story, author Michael Wilkinson presents five closing activities facilitators can use to end their training courses in an engaging and meaningful way. And in these times of virtual everything, Wilkinson notes the activities trainers can easily use or adapt for virtual training.

The second theme article, by Sean McLean and Tom Sidebottom, offers guidance on co-facilitation. "Co-facilitation or co-teaching seems like a solution for so many class challenges; yet, somehow, it's not as easy as it sounds," they write. As Wilkinson does in his article, McLean and Sidebottom bring attention to virtual training environments and some of the specific challenges and best practices for teaming up in those situations compared with face-to-face, in-person training.

I recognize that many of you may have the magazine mailed to your work address, so it may be some time before you can access a physical copy. But remember that *TD* magazine is always available online—the full issue as a digital flipbook or PDF download, as well as individual articles displayed on webpages—and in the free ATD Publications app (td.org/PubsApp).

Take care. Be safe.

Vanessa St. Gerard
Editor-in-Chief
vstgerard@td.org

IN PRACTICE

Manufactured Gender Diversity

A new survey reveals the difference between lip service and real gender diversity efforts.

BY HANNAH STERNBERG

You've heard the story: A company adds gender diversity to its list of priorities. Everyone agrees it's a great idea—who wouldn't? In fact, all the managers report they don't really consider gender in hiring and promotion decisions; they're just looking for qualified candidates.

Yet, despite everyone's best intentions, they're dismayed to discover that year-over-year gender representation remains unbalanced, and female employees report feeling passed over once again. Why?

A new report from Influential Women in Manufacturing sheds some light on the issue. Although 82 percent of respondents, all from manufacturing organizations, said their companies have women in executive positions, only 48 percent considered their companies progressive in terms of gender diversity. Further, many female respondents noted their gender as a barrier to their career development.

According to the report, more than a quarter of female respondents either disagreed or strongly disagreed with the statement that their company cares about employee development. However, only 18 percent of male respondents held those same views. Further, male respondents who weren't inclined to agree with the statement were more often neutral (29 percent) than female respondents (17 percent).

Another barrier may be an insider culture. That culture may be what drives more women than men to seek professional development opportunities outside their workplaces. Many women cited the "old boys club" culture in manufacturing as a barrier, despite the presence of leadership or development programs, because individual managers were responsible for selecting who was chosen for those programs. That opens the door for inherent bias.

What can your organization do to level the playing field and overcome inherent bias? Many female respondents took advantage of mentoring and coaching programs, which may offer an equitable way to access professional development. Blind screening processes for new hires and even promotions may be effective, as can ensuring that social and networking aspects of the workplace culture are inclusive.

Hannah Sternberg is a production editor for ATD; hsternberg@td.org.

BONUS APP CONTENT

PRACTICAL POINTERS

Use the Familiar to Attain Sustained Change

Talent development professionals can look to the ADDIE model for leading organizational change.

If you're facing organizational performance issues well beyond training courses, look no further than the staple instructional design model ADDIE. The steps—analysis, design, development, implementation, and evaluation—will remain the same, but you can adjust the intricacies of those steps to create lasting change.

In "Guide Organizational Change With ADDIE," Eric Nalian details how to adapt the model for company-wide change initiatives.

Analysis. During the first step, interview employees, conduct focus groups, and review processes and procedures that may provide context as to why the organization is facing its current challenge.

Design. Once you have determined the organizational gaps—those related to training as well as leadership and communication—work with your internal client on appropriate solutions, accounting for budgetary considerations.

Development. After the client approves the design, the consultant begins to develop solutions that address the leadership, communication, and training issues that are at the heart of the organizational gap.

Implementation. "Each of the leadership initiatives, communication adjustments, and training programs will have its own timeline to assist in a smooth change transition," explains Nalian. Thus, implementation will occur over an extended period to improve chances that change will stick.

Evaluation. In this step, expand on your usual work with a method such as Kirkpatrick's levels of evaluation to measure the success of the change initiative in meeting the organizational gaps.

MORE ONLINE

These tips were adapted from the May 2020 issue of *TD at Work.* Learn more at td.org/TDatWork.

TREND WATCH

Some videos capture learners' attention better than others.

Not All Learning Videos Are Created Equally

BY AVRA BOSSOV

Learning videos provide a cost-effective and scalable way for companies to train employees. Plus, employees are more accustomed to video content than ever before because of easy access through smartphones and streaming services like Netflix.

In its sixth annual *State of Video in the Enterprise* study, Kaltura found that 91 percent of the 1,200 surveyed employees underwent video-based training in 2019. Similarly, 90 percent said they had used videos to learn a specific skill.

However, video's ubiquity also means learners have higher standards for the learning videos they consume. According to the study, 72 percent of employees admit that they do not give learning videos their full attention, which can limit how much information they absorb and how well they retain it.

So, how can talent development professionals ensure their videos captivate their audiences? Kaltura suggests interactivity and virtual classrooms as two popular approaches.

Include interactive elements such as quizzes and hotspots, which link to additional materials or videos, to increase completion rates and retention. Recording virtual classroom sessions—live instructor-led online training—can leverage live interactions and become rewatchable for employees to refer to later.

Another strategy is to use microlearning videos when creating content for skills training. These brief, always accessible videos can

BONUS APP CONTENT

IMAGE | ADOBE STOCK

help employees learn skills at the exact moment of need.

Many organizations, however, may need additional resources to implement those strategies. The study found that only 50 percent of employees had access to basic video creation tools, let alone advanced ones for making high-quality training videos, and only 36 percent had a way to securely share videos.

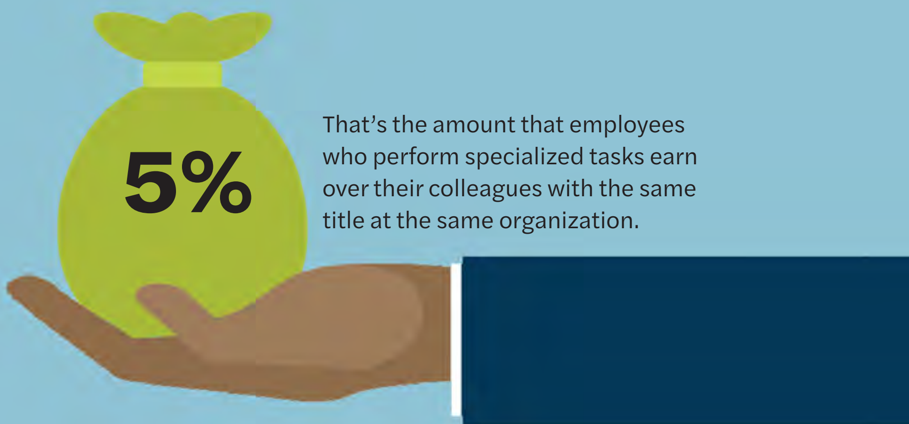
Avra Bossov is manager of brand engagement and strategic communications for ATD; abossov@td.org.

69%

of employees would prefer to learn a new skill from a video rather than a written document.

FAST FACT

Niche Roles Pay



That's the amount that employees who perform specialized tasks earn over their colleagues with the same title at the same organization.

SOURCE: "JOB TURF OR VARIETY: TASK STRUCTURE AS A SOURCE OF ORGANIZATIONAL INEQUALITY," *ADMINISTRATIVE SCIENCE QUARTERLY*, 2020

IMAGE | ADOBE STOCK

HOT TOPIC

Empower Data Literacy

Companies can help employees become comfortable understanding and using data.

BY ELIZA BLANCHARD

BONUS APP CONTENT

There is no argument that data has incredible potential to help organizations achieve key business results. But employees may feel ill-equipped to understand and use it, according to *The Human Impact of Data Literacy,* a research report from Accenture and Qlik. The companies asked 9,000 employees from around the world about their comfort level with using data to make business decisions. The research found a significant gap between the perceived importance of data and employees' data-oriented skill sets.

IMAGE | ADOBE STOCK

A sizable majority—87 percent—of respondents agreed that data is an asset. However, only 25 percent said they are fully prepared to use it effectively, and just 21 percent reported being confident in their data literacy skills.

The research also uncovered the extent to which employees' discomfort around data leads to a decline in productivity. Three-quarters of employees reported feeling overwhelmed or unhappy when working with data, and 61 percent reported that data overload has contributed to workplace stress. Nearly one-third of employees said that they have taken at least one day of sick leave because of stress related to information, data, and technology issues. Overall, the report reveals that companies lose an average of more than five working days (43 hours) per employee each year because of workers' lack of data literacy.

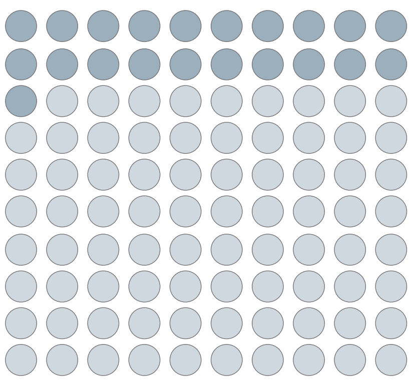
Accenture and Qlik recommend that organizations take a series of actions to help their employees feel empowered when using data to make decisions. That includes setting clear expectations around the role data should play in the workplace and taking steps to close the data literacy skills gap.

Of particular note to talent development is the role that training programs can play in empowering employees, with 37 percent of survey respondents saying that data literacy training courses would make them more productive. As talent development professionals look to broaden their business impact, helping to improve employees' comfort with data is a tangible way to drive results, increase productivity, and foster engagement.

Eliza Blanchard, APTD, is a content manager for ATD; eblanchard@td.org.

21%

of employees report being confident in their data literacy skills.



COOL TOOL

OBS Studio

Whether it's for broadcasting a training session throughout your organization, making tutorials, or giving people a tool to help them create user-generated content, easy-to-use video software is always beneficial for talent development. And for those with limited resources at their disposal, free software is even better. That's where OBS Studio comes in.

An open-source software for video recording and live streaming, OBS Studio (obsproject.com) is available for Windows, Mac, and Linux operating systems. It features real-time video and audio capturing and mixing, enabling you to mix media from sources such as screencasts and webcam footage to make professional-looking videos. It comes with deep configuration options and settings, making the software easy to fine-tune for an organization's needs. Also, being open source, the software's code is publicly available, which means companies can provide it to their IT departments for deeper customization.

In addition to its powerful, budget-friendly features, OBS Studio has many support resources that ease the learning curve. On its help page, you can find a wiki and guides for using the program and troubleshooting. There is also a link to an active Discord chat room and forums where you can communicate directly with other OBS Studio community members, power users, and developers.

WORD WIZ

Belonging

Should work be a place where people feel included, or should they feel like they belong? That question—and the difference between inclusion and belonging—has grown increasingly influential in conversations around workplace diversity and inclusion. A *Washington Post* article points out that *belonging* is becoming more widespread, noting that many prominent companies, such as LinkedIn and Nordstrom, now even have executives with the word in their titles.

Why have organizations started talking about belonging? According to the *Post,* it's because "the idea suggests employers shouldn't just focus on numbers of women and people of color," but instead "focus on whether workers sense they can be themselves and feel like part of a community."

A *Harvard Business Review* article fleshes out the idea further. It characterizes belonging as "a key missing ingredient in the D&I cousin," something that people naturally, instinctively crave. It's "the sense of being accepted and included by those around you."

However, not everyone agrees that *belonging* will advance conversations around D&I. Experts in the *Post* article cite issues with the word, including its vagueness, its translation to concrete practices, and a lack of evidence that it will sway workers who are already skeptical of D&I initiatives. Moving forward, companies will need to sort out those and other issues to build organizations where everyone feels they can belong.

OFF THE WIRE

Three Big Points

Here's the deal: Give 10 minutes of your time and get three big takeaways regarding a major issue affecting companies and people around the world. That's the premise of *Three Big Points*, a podcast from *MIT Sloan Management Review.* Hosted by Paul Michelman, the publication's editor-in-chief, the series focuses on taking wisdom from the world's leading experts and making it digestible, manageable, and ready for use.

The show relies on a simple format. Michelman presents a topic, introduces the episode's expert, and then jumps into the interview. The host and expert discuss the topic for several minutes before the show's signature ending: the three big points. In that part of the episode, Michelman helps the episode's guest frame three short takeaways that are easy for listeners to remember and act upon.

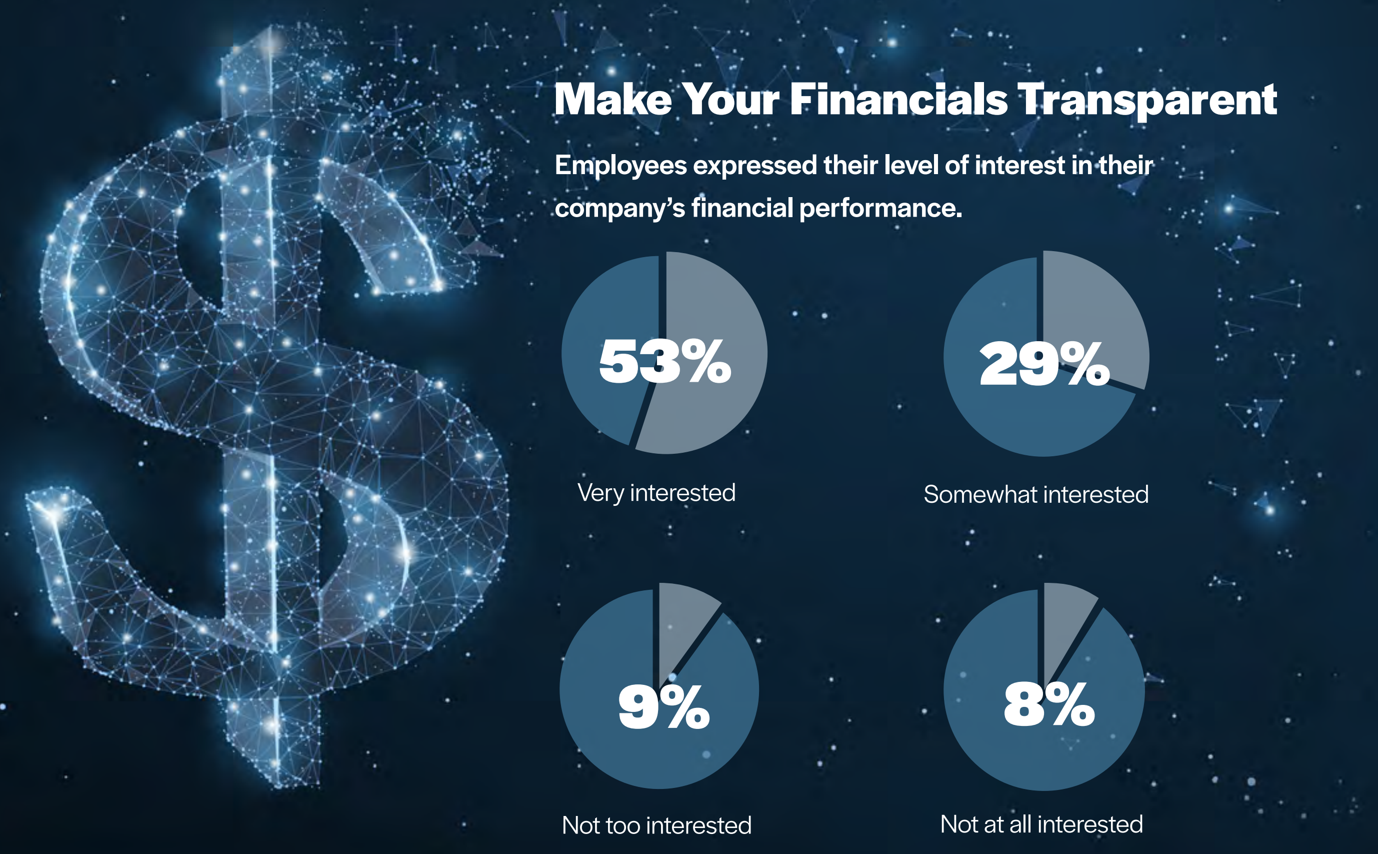
For example, episode 11, "Can We Escape the Technology Trap?," features an interview with Oxford economist Carl Frey, author of *The Technology Trap: Capital, Labor, and Power in the Age of Automation.* Michelman and Frey mull over an ongoing characteristic of technology discussions: Resistance is technology's constant, natural companion regardless of the technology.

Frey suggests that countries with strong safety nets lessen this resistance because they mitigate the short-term damage technology does to those it replaces. The reduced resistance, in turn, helps those societies capture more of technology's long-term benefits. The episode's three big points are:

- Over time, societies benefit enormously from technology.
- New technologies haven't always been equally beneficial for everyone, especially in the short term.
- Resistance is futile.

IMAGES | ADOBE STOCK

INFOGRAPH



SOURCE: ROBERT HALF MANAGEMENT RESOURCES, 2020. RESPONSES DO NOT ADD UP TO 100 PERCENT DUE TO ROUNDING.

INNOVATIONS

Insurance Company Investing Millions to Upskill and Reskill Workers

Nationwide Mutual Insurance Company is committing $160 million over five years toward Future of Work, a new reskilling and upskilling program. The company has also incorporated increased bonus incentive targets and is piloting a Summer Fridays program. It hopes the investment will enhance its business outlook and make it more competitive for talent.

"We must attract, develop, and retain the best and brightest," says Nationwide CEO Kirt Walker. He explains that the Future of Work program's purpose is "to elevate Nationwide as the desired destination for top talent and prepare our workforce for the future."

What exactly will the Future of Work program entail? According to the company, it will help workers improve their digital literacy and give them opportunities to undergo training on important future-ready skills. Each employee will receive an annual personalized learning curriculum focused on growing their skills, and Nationwide will provide reskilling opportunities specific to individual business units.

The firm says its investment in a broad upskilling and reskilling program was inspired by its previous experience with similar efforts on a smaller scale. "We've already had great success in reskilling within our IT organization," says Gale King, Nationwide's chief administrative officer. "We've also had success through apprenticeship programs."

IMAGE | ADOBE STOCK

Recognize and Reward

Companies should improve their performance management process to acknowledge employee performance and contributions.

BY SHAUNA ROBINSON

Nearly all organizations have a performance management process—but not many employees think it's working.

The Association for Talent Development's research report *Performance Management: Driving Organizational and Personal Growth* found that while 94 percent of companies have a performance management process, less than half of the talent development professionals who were surveyed believe that process is highly effective in any area. Respondents were most likely to feel the process is highly effective in evaluating performance (44 percent) and developing goals (42 percent).

However, about one-quarter believe their organizations' process is highly effective in incentivizing performance. Similarly, when respondents were asked about the biggest barriers to effective performance management, a top obstacle they identified was an inability to adequately reward or incentivize

IMAGES | ADOBE STOCK

performance that exceeds expectations. Evidently, there is room for organizations to improve in this area.

The most common methods companies use to reward employees for good performance are salary increases and promotions, both applied by two-thirds of companies. But two other methods—a financial bonus or a recognition or award—had the strongest link to effectiveness. Top-performing organizations, defined as those whose employees said their organizations' performance management process was highly effective in all areas of the process, were significantly more likely than all other companies to reward employees with a financial bonus or a recognition or award. In fact, Gallup research has found that recognizing good performance is linked to higher employee engagement, increased productivity, and increased company loyalty.

Patrick Boyle, senior vice president and chief learning officer at UL, is a proponent of recognizing employees for their contributions. "I think the biggest reward is immediate recognition," he says. "It's easy, it's cheap, and people feel really good about it."

Boyle says time is of the essence when it comes to recognizing employees. "When you see it, reward it immediately." At UL, Boyle uses an app to recognize employees for their work.

Shauna Robinson is a former ATD research analyst.

BONUS APP CONTENT

1 in 3

employees sees no strategic value in their learning.

Align Learning and Strategy

Helping employees link their learning with organizational needs enables them to prioritize and improve decision making.

BY ROD GITHENS AND ANN HERD

When employees see a connection between their work, their learning, and organizational strategy, they make better daily decisions. That connection helps them know where to put their energy when competing priorities exist.

We led a process of facilitating a systemwide vision and direction for organizational learning within a 40-location healthcare system in the Southeastern US with more than 12,000 employees. The executive team aspired to attain perfect alignment between learning and organization development and systemwide strategy. As part of a bigger initiative, we developed a way to measure that alignment with our survey instrument, the Strategic Human Resource Development Alignment Index.

We surveyed 2,062 employees at all system sites, using email and deploying a team with tablets to capture workers in high-traffic areas who don't sit at a desk. We made several discoveries.

Awareness is key. Merely knowing about the available learning opportunities affected employee perceptions of having a positive learning culture, alignment of learning and strategy, and corporate investment in employees. This finding suggests that both formal internal marketing of learning opportunities and strong word-of-mouth awareness can have a positive effect. Talent development professionals can ensure awareness by continuously communicating learning opportunities and their connection with organizational strategy.

Employees need to believe their employers invest in them. Employees who perceived that their organizations invest in their development reported greater strategic alignment of their learning experiences. We found perceptions of employer investment in employees connected with feelings that work is meaningful, allowing for positive self-expression and space for contribution. Those findings suggest that TD professionals need to ensure that employees have an awareness of the value of the organization's investment in employees.

Manager support is a crucial leverage point. Employees who reported higher levels of managerial support for their learning also reported higher levels of alignment between their learning and organizational strategy, positive organizational learning culture, and a positive climate where work is personally meaningful. Managers serve an essential role in connecting employees with the overall direction of learning and strategy.

The good news is that the TD team has key leverage points to increase employees' connection between daily work, learning, and organizational strategy. Doing so requires TD execs' focused, consistent messaging to senior and midlevel leadership. Frontline managers should have ongoing conversations with their teams and employees to explicitly connect learning opportunities with organizational needs.

Further, the TD team should ensure continual communication and marketing on how the company invests in employee development and how that development connects with a culture of planned, strategic learning. For their part, managers need to work individually with employees to support their learning goals and articulate the ways learning and growth align with the company's strategy.

Rod Githens is the Alexandra Greene Ottesen endowed chair at University of the Pacific and founder of Githens and Associates; rod@githensassociates.com.

Ann Herd is an assistant professor of HR and organization development at the University of Louisville and an independent executive coach and consultant; ann.herd@louisville.edu.

Tap Teammates for Training Tools

An in-house learning fair for trainers enables them to learn from colleagues.

BY LISA PARTRIDGE

You have a team of trainers who would love to connect more, bounce ideas around, and learn some new techniques to include in their workshops. However, there is limited time and no budget allocated for such an event.

The trainers and facilitators want to be more creative in the way they deliver training programs, but they are so busy that there isn't the opportunity to reflect and explore new ways to deliver. That is frustrating for the training team but perhaps more importantly, it has a negative impact on the learners who are not experiencing the most up-to-date, creative learning experiences.

To give the training team an opportunity to quickly and easily learn from each other, my colleague and I created a learning fair using an available training room in our building.

We set up four booths, three of which provided trainers with ideas for future training sessions; the final booth captured feedback on how to improve future events—sessions for learners and events for trainers. At these stations, our training team engaged in hands-on experience of facilitation techniques and learning activities. An open space in the middle of the room enabled trainers to roam around freely and network with their colleagues when the opportunity arose.

Booth 1: Conversation starter cards. The first booth featured a getting-to-know-you activity used at the beginning of a workshop to build trust and connection within the group. During a training session, the activity enables learners and the facilitator to recognize the areas of commonality in the group, develop rapport, and create a space for sharing and co-creating.

Booth 2: Wave analysis process. Here, trainers recorded ideas on facilitation and training in terms of cutting-edge ideas, emerging trends, established norms, and dying practices. It enabled trainers to reflect on the training and facilitation landscape and to see where the team could develop capacity and skills in areas of emerging trends. Furthermore, it enabled us to leverage the aspects of our work where we have established skills and expertise, sharing them with others.

Booth 3: Positive affirmation cards. This booth provided an energizing activity where participants could share positive affirmations with each other and experience how it felt to read and hear them. This activity highlights the importance of having a positive attitude and mindset when preparing for an important meeting or presentation at work.

Team Benefits
The L&D team connected in an engaging environment without time pressures or expectations. Authentic connections and idea sharing added to trainers' learning activities toolboxes.

Organizational Benefits
Participants posted event photos on social media, increasing the training department's visibility and initiating conversations with external L&D professionals.

Resources Used
The L&D team tapped internal training consultants' subject matter expertise, energy, and creativity. Using an on-site training room saved off-site venue and travel costs.

Booth 4: Digital journal. The digital journal enabled attendees to record feedback (by video, audio, or note) on the learning event as a whole, the individual stations, and the ideas that came to mind on how we could use or adapt the activities to the different workshops and training sessions we offer.

None of our trainers could commit to a whole day or even a few hours to the learning fair, but the beauty of it was the drop-in-and-out concept. Whenever trainers were free, even for just 20–30 minutes, they could pop in and check out the booths. We kept the event as relaxed as possible, asking guests to move around the room at their own pace and experience the four booths in any order they liked. The fair's tagline was: Experience! Engage! Be inspired!

We encouraged colleagues to snap pictures and post them on social media with our team's hashtag so we could increase our visibility and stimulate conversation with our industry peers. This created free marketing and further peer-to-peer learning.

We couldn't afford an external facilitator to host the event, so my colleague and I hosted the entire day at zero cost to the organization. We complemented each other well because I specialize in the facilitative techniques, and she specializes in the digital side of things. While I guided the trainers through the learning activity booths, she helped those who were using the digital tools to record their feedback and ideas. We leveraged our internal talent, coming up with the idea, designing it, and hosting it.

An event such as this also works if you're a training department of one. Enlist other small organizations and their training teams of one and get together to brainstorm about creative and cutting-edge facilitation techniques.

SOLUTION

L&D teams with a small or no budget can rely on team members to combine their skills to co-create inspiring learning events.

While I considered our event a great success, we also learned some lessons—things we would do differently for a similar event in the future and that I would recommend to others.

Buy-in. Before you hold this type of event for your team, spend some time thinking about how to clearly describe and explain the concept. That will ensure that all stakeholders buy into it and you can create some excitement and anticipation before the event takes place.

Follow-up. Make sure you have planned a follow-up reflection session where you can discuss feedback and elaborate on any ideas participants shared. Try to schedule this session soon after the event so you maintain the momentum of engagement and learning.

We did not commit to putting a follow-up session into the schedule, so it was forgotten as other work inevitably popped up. The one-day learning fair will therefore remain a nice one-off event rather than a continuous learning journey with follow-up actions.

It may be that you and your team are happy with it just being a single event where trainers connect; that is fine if that is your intention. However, if your purpose is to use the event as a springboard to start a longer conversation, make sure you commit to this follow-up session and make the intention known to the whole team.

Expectations. If you plan to facilitate an event with a colleague, ensure that you have a clear purpose for the event so that when you are interacting with the guests, you are speaking from the same page. Likewise, make sure to agree on how you and your co-facilitator will distribute the workload.

You also should agree on how you will interact with the guests. For example, will one host be responsible for a certain number of stations, or will you both be staffing all stations together? How will you interact with the guests—will you wait until they have questions, or will you initiate conversations with them?

Event structure. We left the structure of the day open and relaxed. For example, trainers could drop in and out of the room at any time throughout the day from 9 a.m. to 5 p.m. On reflection, it may have been better to set up time slots for participants to stop by to ensure a more balanced attendance of guests over the whole event.

At certain times in the day, we had a lot of guests, specifically in the morning. But the participants were sparse at times in the afternoon. The idea was that trainers would interact with each other at the stations. Sometimes, however, there were only one or two trainers in the room in addition to us as hosts.

RESULTS

$0

The training team had the opportunity to connect and add to its repertoire of learning activities at no cost to the organization.

Lisa Partridge is a facilitator and course designer working in Singapore; linkedin.com/in/lisasing.

Create Opportunities for Coaching

In-the-moment coaching ignites insights that drive learning.

BY DIANNA ANDERSON

Is becoming a better coaching-based leader at the top of your career to-do list? The transition from a traditional problem-solving approach to leadership to embracing in-the-moment coaching is not as simple as it may seem. To become a better coaching-based leader, you need to look at everyday situations through a different lens and likewise respond to what you see in new ways.

Opportunities to offer in-the-moment coaching are all around you, but you may not even recognize them. They may be the things that annoy or mystify you about others. To find them and make them happen, you must look through a coach's eyes. Turning any interaction, with anyone, into a coaching moment can facilitate learning and initiate forward momentum.

IMAGE | ADOBE STOCK

Coaching as a means to learning

What you believe coaching is will limit or expand your ability to recognize opportunities to offer in-the-moment coaching. My company defines coaching as the translation of insight into meaningful action to realize potential. Let's break that down.

The energy that the human brain releases when learning something new is what ignites the motivation that drives coaching of any kind. No insight, no coaching. It's that simple.

Coaching delivers value when people take action and turn what they learned into new ways of thinking and doing things. The goal of any coaching interaction is to help others realize more of their potential. It's that good intention to be genuinely helpful to others that creates a safe space where people are open to learning.

Based on that definition, you can weave in-the-moment coaching into any kind of conversation or situation, at any time, with anyone. It can be, but doesn't need to be, a one-on-one interaction. Opportunities for in-the-moment coaching can look like:

- using coaching approaches, such as asking a reflective question or sharing an analogy, to help a team that is stuck get on the same page during a team meeting
- pausing to ask your employee what her thoughts are for moving a project forward, rather than giving her a fast answer when she asks you what to do next
- discerning what's keeping group members from embracing a change and using a story that helps them believe they can successfully move through their concerns, rather than lecturing them about the need to get with the program
- helping a peer or friend recognize how he is getting in his own way when complaining about a situation, rather than hoping he will figure things out on his own.

In-the-moment coaching is appropriate when there is an opportunity for learning and the person or people can choose how they want to move forward. If there is only one answer or a person is required to do something, that's not a coaching opportunity. Similarly, pretending to coach people when you are just trying to get them to do what you want them to do feels manipulative and isn't real coaching. Accomplish in-the-moment coaching in four steps.

Step 1: Get curious

You create opportunities for coaching when you get curious about why people are doing whatever they are doing and see that whatever people do, it makes sense to them. Coaching begins when you choose to get curious about the choices a person is making, with the intention of appreciating how whatever she is doing is serving her in some way.

The goal of any coaching interaction is to help others realize more of their potential.

Open in-the-moment coaching conversations by inviting people to share their perspectives with a question such as "What's concerning you the most about this?" or a statement such as "Tell me what's going on." Then listen. Quiet your inner critical voice saying, "Seriously? That's ridiculous," and get curious about how the other person sees the situation.

Step 2: Consider what's stuck

Once you have an appreciation for the other person's perspective, consider: What's keeping this person from moving forward and being successful?

An individual's assumptions and beliefs about how the world works dictate the actions that person takes. When people's assumptions are accurate and align well with the world they live in, things flow smoothly. When those assumptions are off in some way, people get stuck. Coaching adds the greatest value when it helps individuals expand their limiting assumptions and beliefs and embrace new ones that support them to successfully move forward.

People can also get stuck when their fears and concerns keep them from doing what they need to do to attain their desired outcomes. Another great way that coaching adds value is by helping others recognize and move through their fears.

When individuals are fearful, they often do things to try to reduce their feelings of vulnerability, such as avoiding tasks, blaming others, and disengaging. When you can't make sense of someone's behavior, there is a good chance that the person's actions are his best attempt to protect himself when he feels frightened. Getting curious about what a person may be afraid or concerned about can help you recognize fear-based limitations. Focusing in-the-moment coaching on specific limitations can create tremendous momentum for significant change quickly.

Step 3: Ignite insight

People change to attain the things that are important to them. If you want to invite others to consider changing, help them see how they will benefit by doing so. Keep in mind that, as much as you may want to change others, you can't. We can only change ourselves. That's why coaching is so important. Igniting insight that enables people to see how they will benefit from doing some-

You Need More Than Questions to Coach

Questions are great coaching tools, but if questions are all you have, it's like only having a hammer. Sometimes you need a wrench. When someone is unaware of something, asking them questions about the situation rarely ignites the kind of insight needed to inspire change.

Let's take an example of a team lead who believes that a lack of commitment on the part of a couple of his team members is the reason the team keeps missing deadlines, and his poor organization skills have nothing to do with the situation. You can ask the team lead all the questions you want—such as "What do you think the problem is?" and "What can you do differently?"—but he will unlikely see his contribution to the situation. When coaches only use questions, coaching can feel like it takes forever—often because it does.

To quickly ignite the insight necessary for people to see what they are unaware of, you need higher-order coaching approaches such as offering insightful observations or in-the-moment feedback. Used well, those coaching approaches quickly illuminate what's stuck without creating a defensive reaction. Then, stories, metaphors, and analogies help people envision a productive path forward that they believe will result in positive change.

Higher-order coaching approaches inspire significant action more quickly because they enable coaches to use their own insights to ignite others' insights. It's not telling anyone what to do; it is simply illuminating a pattern of behavior that someone can choose to change—or not.

People can't change patterns of behavior that they are not aware of, and questions are poor tools for illuminating more complex patterns. That's why you need a full complement of coaching approaches in your coaching toolbox to quickly ignite insight in the moment.

thing differently is the secret to inspiring people to take action.

The goal of any coaching interaction is to help people see there are other ways of thinking about or acting on whatever is keeping them from moving forward successfully. If a person's assumption or belief about the situation is what's causing them to be stuck, consider, "How can I help the person see what they are not aware of?" Or if the limitation is fear-based, give thought to "How can I support this person to move through their fear?" Note, however, that you need more than questions in your coaching toolkit to effectively ignite these kinds of insights quickly (see sidebar).

Use higher-order coaching approaches such as analogies, metaphors, and your own insightful observations to point toward what is stuck and invite the person to look at the situation from a different perspective. It is likely that you'll need to use more than one coaching approach to ignite the kind of aha experience that inspires change. You will know you've been successful when the person seems genuinely ready to take meaningful action.

Step 4: Consider next steps

Coaching delivers value when people take action to go beyond their limitations. With in-the-moment coaching, sometimes it's appropriate to offer support, and sometimes it isn't. If you took a coaching approach to a conversation with your peer or your boss, let her decide how to take action on the insights that were ignited. If you are coaching your direct report, talk through what support she may need to feel confident about taking next steps.

You may be thinking, "I don't have time for that. It's faster to tell people what to do." Think again. It may take you a bit longer in the beginning as you are building your in-the-moment coaching skills, but as your competence increases, so will the speed with which you can quickly get to the heart of any matter and inspire real change.

Imagine for a moment that in-the-moment coaching is your primary leadership style. Can you envision how much easier life will be? Now imagine your entire organization embracing it as a way of life. Can you feel the power of people learning with and from each other, everywhere? That's what a coaching culture looks like, and that's why in-the-moment coaching is a fast, effective way to ignite one. Be a spark for that possibility.

Dianna Anderson is CEO of Cylient; dianna@cylient.com.

A Workforce That Spans the Spectrum

Companies are seeking out neurodiverse workers to join their teams.

BY RYANN K. ELLIS

Successful organizations recognize the significance a diverse workforce has on productivity and profits. They know that being able to respond innovatively to changing customer requirements, effectively reach global markets, and attract top talent requires an aggressive approach to gender, ethnic, racial, and generational diversity. But another aspect of diversity taking shape in the modern workplace is neurodiversity.

Neurodiversity in organizations means teams are supplemented by neuro-untypical employees who have natural and valuable variations in brain function and behavior, which affect how they process information and interact with others. Typically, neurodiverse workers include those with autism spectrum disorder (ASD), Asperger's syndrome, attention deficit and hyperactivity disorder, dyslexia, and other cognitive differences.

According to the Centers for Disease Control and Prevention, roughly one in 60 children today is on the autism spectrum, and the World Health Organization estimates that one in every 160 children worldwide will develop some form of autism. Unfortunately, though, a Drexel University study found that 58 percent of young adults with ASD are unemployed.

IMAGES | ADOBE STOCK

Data from Autism Works offers a bleak story for how those numbers play out in the workforce. The organization, which works closely with families and the local community to increase autism awareness and develop programs for individuals with ASD, reports that unemployment rates for people on the autism spectrum can be as high as 77 percent. And those individuals who are employed often work in menial jobs that do not reflect their strengths or interests. Drexel's analysis adds that more than half of working adults with autism say their skills are higher than what their jobs require.

Auticon is working to create a new narrative for such workers. The global IT and compliance consulting business provides quality assurance testing on software and web-based applications—and it exclusively hires employees who are on the autism spectrum. CEO Kurt Schöffer notes in a written statement that Auticon's mission is "to bring awareness to neurodiversity while creating distinguished career opportunities for this underutilized talent pool."

Opportunities and advantages

Auticon reports that the adults with ASD it employs have heightened cognitive capabilities in logic, pattern recognition, precision, and sustained concentration, as well as an ability to intuitively spot errors. The firm taps into this potential and accelerates "employment opportunities in tech and consulting for the exceptionally talented and skilled adults on the autism spectrum," Schöffer adds.

Auticon is not alone in its belief that differences in learning, attention, and other cognitive capabilities are not a deficit but an advantage. EY's Neurodiversity Center of Excellence also is focused on hiring more workers with ASD. Its initiative launched in 2016 in Philadelphia, Pennsylvania, where technical professionals handle data collection and analytics, document tracking and control, and other detailed tasks. EY chose Philadelphia as a pilot location because of its proximity to universities with good STEM and autism-specific programs and its location midway between New York and Washington, DC.

"Neurodiverse individuals are often technologically inclined and detail oriented, with strong skills in analytics, mathematics, pattern recognition, and information processing—among the very skills businesses most urgently need," says Karyn Twaronite, EY's global vice chair of diversity and inclusiveness, on the company's website.

According to EY, in the first month, the workers in the program identified process improvements that cut in half the time for technical training. Co-workers also noted that their neurodiverse counterparts learned how to automate processes far faster than the neurotypical account professionals they trained with. The neurodiverse workers then used the resulting downtime to create training videos to help all professionals learn automation more quickly. EY expanded the program to Dallas, Texas, in 2017 after this early success, and the initiative continues to grow to other locations.

"Companies are finding that people with autism approach problems differently and that their logical, straightforward thinking can spur process improvements that greatly increase productivity," adds Twaronite.

Opening the door

Microsoft's Autism Hiring Program began in 2015 to source talent for various teams within the company, including software engineering, data science, and content writing. The process for acceptance into the program includes attending an autism hiring event, where eligible candidates take an initial technical skills assessment, followed by a phone screening and an invitation-only, weeklong campus event to determine whether skills and workability match with the company's needs.

"We knew there are immensely talented people with autism that could thrive at Microsoft if we thought more broadly and inclusively on how to attract that talent and adjust our recruitment and onboarding process," says Neil Barnett, director of inclusive hiring and accessibility. He explains that traditional hiring processes can be a major barrier of entry for job candidates with ASD. "By adjusting the shape of the door, we could help candidates showcase and demonstrate their talent to hiring managers," he notes.

Since the program's inception, more than 50 full-time neurodiverse employees have joined Microsoft. All these roles are based at the company's headquarters in Redmond, Washington; 70 percent of the hires have relocated.

Similarly, Freddie Mac created an internship program designed to match its business needs with the unique abilities of individuals with ASD. The program enables the federal home loan mortgage corporation to reach into a largely untapped talent source—young adults with ASD who have college degrees in fields such as computer science, mathematics, and finance. Freddie Mac works with a network of organizations, including the Autistic Self Advocacy Network, to identify candidates, craft job descriptions, and help selected interns realize their full potential.

Understanding differences

Marcelle Ciampi, author of *Everyday Aspergers,* is a senior recruiter and outreach specialist at Ultranauts, a technology company with a neurodiversity hiring initiative. More importantly, she has been diagnosed with Asperger's syndrome, giftedness, and dyslexia.

Ciampi discloses on The Aspergian, a website focused on documenting the autistic experience through the lens and work of individuals with autism, that she's worried some companies that pursue neurodiverse workers do so with a limited focus on what true workplace inclusion looks like and that heads of diversity departments sometimes fail to check stereotypes and their own implicit biases at the door.

Leaders from Auticon convey similar concerns. The firm is quick to note that autism affects individuals differently, and each person on the autism spectrum has a unique profile of characteristics.

What is common to all neurodiverse workers, however, is that in addition to high levels of specialized skills and competence, autism also can bring with it challenges in professional life and interpersonal interactions that people without autism usually master with ease. Managing and understanding factors such as eye contact and touch, small talk, nonverbal signals, and excessive sensory can make it difficult for employees on the autism spectrum to collaborate with neurotypical employees in companies, explains Auticon.

To ease such interactions, Auticon employs specially trained job coaches who offer individually tailored support. Job coaches can help facilitate communication and become active when anyone—neurodiverse or neurotypical—needs help or advice. Depending on each person's individual needs, job coaches may also facilitate adjustments to the workplace environment.

"Our approach embraces the notion of self-empowerment, which is why our job coaches provide as much assistance as needed but always as little as possible," Auticon notes.

Providing the right support

Candidates in EY's program also receive specialized screening and training. For starters, those who make it through a phone screening are invited to the office for a half-day of group activities. Twaronite describes it as a hangout designed to assess critical thinking, technical skills, and teaming. Those selected to move forward receive an invitation to attend a weeklong, in-person orientation, training, and evaluation experience called SuperWeek.

During SuperWeek, they participate in team-based work simulations, interpersonal skills development, and introductions to the role and firm. And support doesn't end there. Additional onboarding and training are conducted by hiring managers who have taken formal training in autism and have become familiar with the candidates throughout the sourcing and selection process.

New hires at Microsoft also receive onboarding support. In particular, the business finds that navigating logistics and interpreting expectations can be overwhelming at first, so it makes delivering detailed instructions for this cohort a priority. For example, Microsoft is explicit about specific locations, reporting relationships, and dress code; it also prepares a detailed itinerary for the first day or week for some new hires.

In addition, Microsoft tasks some colleagues to be coaches, mentors, or members of what is called a support circle, which provides work-related information and social support to new hires as they transition into their new role and organization.

Company leaders and colleagues also receive training on how to effectively manage neurodiverse team members and create a more inclusive experience for everyone. The advice can be simple, says Barnett.

"Providing feedback more often, sharing recaps of meetings in writing, and giving clear expectations are all examples of approaches that are helping all our employees succeed," he explains.

Ciampi advises businesses with neurodiversity programs to provide a clear avenue to request accommodations or workplace adjustments during the hiring process and onboarding. For example, having job accommodation forms can simplify this process. She also recommends that the best means of supporting new hires with ASD is other employees with autism. In other words, when possible offer training by co-workers and managers with autism and pair new hires with job coaches who are on the autism spectrum.

Finally, to better prepare and train neurotypical colleagues who will work with employees with ASD, Ciampi suggests that companies avoid thinking it is best to ask neurotypical employees what they want to know about autism. Instead, she recommends that companies "ask autistics what they want business leaders to know about being autistic."

Ryann K. Ellis is a writer/editor for ATD; rellis@td.org.

Differences in learning, attention, and other cognitive capabilities are not a deficit but an advantage.

End training with these engaging closing activities.

IT'S A WRAP

BY MICHAEL WILKINSON

IMAGINE THIS: You have had a great training session. Participants showed enthusiasm for the topic; they asked questions that demonstrate they were digesting the tools and strategies; and during the practice sessions, they were able to successfully put their new skills to work.

Now it's time to wrap up the training. You want to close in a meaningful way. You want the close to be engaging, yet at the same time, you want to make sure that what participants learned will translate from the classroom to the workplace. How do you do it?

Consider any of the following five wrap-up strategies. Each one has a slightly different purpose, so you'll want to select the strategy that best serves your objective.

The future letter

The purpose of this 25-minute activity is to encourage commitment to action by having participants write a letter to themselves that states their intent to take a specific action.

Research shows that when a learner commits in writing to take an action post-training and then shares that commitment with another person, the likelihood of the learner taking that action increases significantly. Explain to participants that you would like to harness this power of intention by having them do just that.

Begin by reviewing the key tools from your course and asking participants to pick one that they will commit to using in the next 30 days to ensure that they and their organizations benefit from the class.

Next, explain the letter-writing activity's purpose and offer participants these writing prompts:

- What commitment are you making, and why it is important to you and your organization?
- How are you feeling at this moment and why?
- What obstacles might you face in fulfilling your commitment despite your determination to make it happen?

Allot five minutes for learners to respond to one or more of the prompts, and instruct each person to include their name and email address on their letter. Next, collect the letters before participants leave.

This closing strategy is as effective virtually as it is in a face-to-face classroom environment. Simply ask participants to send you their letters via email.

Three to four months after the workshop, email participants their respective letters, asking them to write back about what they did.

In my experience using this exercise, I have found that when some of the participants receive their future letter, they are surprised at how much they have implemented what they promised to do. For others, however, the future letter is a kick-in-the-pants reminder to begin putting into practice what they had learned during the training program.

Additional execution pointer: As an option, before collecting the letters, ask participants to share them with either a partner or a small group to further reinforce the commitment they have made.

Appreciations

The purpose of this activity is to close a session on a high, positive note by giving participants the opportunity to express appreciation for others in front of the entire group. In turn, recipients of the acknowledgments will learn what they bring to the group.

Begin by asking everyone to pick out one person whose contributions during

IMAGE | ADOBE STOCK

the workshop they greatly appreciated. Allot 30 seconds for participants to reflect on the training session, offering these prompts:

- Think about the moment that you thought was most pivotal.
- Think about who was speaking or whose sharing you found most helpful or most significant.

To keep the focus on your learners, make it clear that you are disqualified from receiving acknowledgment during the activity. Announce that participants should avoid saying, "I want to appreciate Sarah because she …" Instead, they should talk directly to the person, because the feedback tends to be much more powerful that way. For example, they should state "Sarah, I want to appreciate you for …"

When participants are ready, simply start with one person and go around the room until all participants have expressed their appreciation. For a group of 16 participants, allot about 15 minutes for this activity: a two-minute introduction, one minute for individuals to jot down a note, 10 minutes for sharing, and a two-minute wrap-up.

I have found that the appreciations activity can have a powerful impact on groups, regardless of whether I am working with a team of executives or a group of line workers. Appreciations give people insights into how others see them, an often rare opportunity in today's workplaces.

Although this activity can be effective in virtual training environments, the impact is significantly stronger in a face-to-face session due to the emotional connections that are easier for participants to make in person.

Additional execution pointers: Even though you will be hearing everyone's views, it may be helpful to the group to start with someone who—based on their participation and interactions during the class—you believe will readily have a response and be fairly positive in their reactions. This will allow the activity to begin with a useful example.

Likewise, remind the group that it is not important that everyone gets appreciated. Rather, the exercise is for each participant to have an opportunity to show appreciation.

The talking stick

The purpose of this activity is to promote deeper discussion and listening. During this time, participants may say something about what the time spent in training has meant to them, share their expectations for the future, or disclose any other thoughts regarding what they've learned and their experience throughout the course.

HOW YOU CLOSE A TRAINING SESSION IS ALMOST AS IMPORTANT AS HOW YOU OPEN IT.

For a group of 16, this activity can take 30–60 minutes. To begin, stand in the center of the room with a talking stick in hand and ask the group to form a circle around you. If you don't have a stick, consider any other item that can serve as a ceremonial object. I have used a stone and even a coin at times.

Explain that anyone who would like the opportunity to share something with the group may do so but only if they are holding the talking stick. Then simply hold the talking stick out in front of you. The first person to speak must move to the center of the circle and take the talking stick from you. You should then join the others as part of the circle.

The person can speak for as long as he wants and, once finished, holds the talking stick out to offer it to anyone who wants to speak next. Whoever chooses then comes to the center of the circle to take the stick, and the previous speaker rejoins the circle. This continues until no one else wants to speak. I find that the true power in this exercise is that it slows down the conversation and enables people, sometimes for the first time, to feel truly heard.

When nobody walks forward to take the talking stick, ask twice "Anyone else?" If still no one comes forward, go to the center of the circle to take the talking stick, and end the session.

If you run into a situation in which a participant speaks for too long—which technically is allowed, given the rules—respect that person's discourse. As the allotted time range demonstrates, this activity can vary widely in the time needed based on how much participants have to say.

Additional execution pointers: During a break or at some other time in advance, ask someone to serve as the first person for this exercise. Consider picking someone who has been both positive and readily expressive during the workshop. Explain to that person the same instructions you will give to the whole group so that the person will be prepared to speak.

Although trainers frequently use this activity as a closing exercise, they also can use it at any time when the group may benefit from slowing down the conversation (for example, when tension is high or when people are frequently interrupting one another).

The whip

The purpose of this activity is to give participants an opportunity to briefly share their thoughts or feelings at the end of the session—the operative word being *briefly*. It is especially helpful when you have little time to close. This exercise should take only about six to eight minutes for a group of 16: a two-minute introduction, three to five minutes of sharing (10–15 seconds per participant), and a one-minute wrap-up.

Before the activity, develop a question that learners can answer in just a couple of words, such as: As we close the session, what one to three words describe how you are feeling right now? After you've asked the question, name the learner who will start the activity and then give participants some time to determine their answers.

Emphasize that the activity will move quickly, so learners should be prepared to share their answer when it's their turn. To ensure everyone is ready, ask each person to give you a signal, such as a head nod, to indicate that they have their response.

Look around the room at each person. Once everyone has given you a head nod, instruct the first person to begin and then everyone else should subsequently reveal their response one at a time, moving clockwise around the room. There is no need to record the comments shared, because it will slow down the group.

I find this closing activity to be quite insightful. With the words people choose, I can quickly learn who believes they are getting value from the workshop and whom I may need to have a conversation with afterward to make sure I am addressing their need.

Additional execution pointers: As with the aforementioned activities, start with someone who will readily have a response and who tends to be fairly positive in their interactions. Also keep in mind that this exercise works well with virtual participants.

Along with being a good closing exercise, you can also use the whip activity at any time to take a temperature check of the group.

The elevator speech

The purpose of this activity is for participants to develop a brief statement that summarizes the results of a session or other information. When learners leave the training, people will likely ask them, "How was the class?" This is participants' opportunity to craft their responses. An elevator speech is presented in the time it takes an elevator to go from a building's first floor to the top floor—about 30 seconds. The elevator speech should grab attention and deliver the key points in few words.

To begin, display on a flipchart the O WOW format to help participants generate their statements' key points.

- (Overall) Overall it was ...
- (What we did) During the session, we ...
- (One thing) One thing that stood out for me was ...
- (What's next) Going forward, I will ...

Emphasize that the elevator speech should do two things in particular: inform and excite. In this case, learners should inform by telling people what happened during the training course and excite by communicating what most excites them about it.

Allot four minutes for participants to write down bullets for their elevator speech using O WOW as their guide. After everyone has written their elevator speeches, ask them to get into small teams of three or four people and read aloud their speeches. Each small team should then pick one of the group's elevator speeches to share with the entire class. It should take you about 20–25 minutes to complete this activity.

It always amazes me how much people get into creating and sharing their elevator pitches. Often, more than one person from a small group insists on sharing their pitch with the whole class. There's something about the simple format that provides the minimum structure needed to spark creativity.

Additional execution pointers: As an alternative to small groups, you can ask every participant, one at a time, to stand in front of the group to give their elevator speech. To keep the energy up, be sure to have the group clap after each participant shares a statement.

In addition, you can effectively execute this exercise in a virtual classroom.

The finale

How you close a training session is almost as important as how you open it. Your closing can often determine how much of your teaching is applied and how many of your learners apply it. During your upcoming courses, consider trying one or more of these strategies to multiply your impact even more.

Michael Wilkinson is managing director of Leadership Strategies; michael.wilkinson@leadstrat.com.

Master the art of seamless co-facilitated sessions.

PAIR UP

IMAGES | DAGELDOG/GETTY IMAGES

BY SEAN MCLEAN AND TOM SIDEBOTTOM

Have you ever been to a concert where the artists seamlessly switch off to riff? Or a doubles tennis or volleyball match, where the partners seem to instantly and effortlessly alternate lead and supporting roles? Done right, partnered collaboration looks effortless.

That kind of partnership has so many practical use cases in a training forum, for example pairing experts in different fields, pairing a subject matter expert with a trained facilitator, and working with larger or more interactive audiences.

Co-facilitation can make presentations much more interesting for audiences. It's why news broadcasts use multiple anchors—it's great for engagement and retention.

Watching musicians jam and solo may seem unscripted, but it's often planned and coordinated carefully. Likewise for many athletic collaborations, there's some level of planning needed to create that seamless coordination of who drops in and out. The same is true for co-facilitated classes.

Co-facilitation or co-teaching seems like a solution for so many class challenges; yet, somehow, it's not as easy as it sounds. Done poorly, it can wreck a session for both participants and facilitators. What can you do to make a co-facilitated session a certain success instead of an almost guaranteed failure?

In our shared experience, planning a session is frequently assumed, rarely communicated, and almost never formalized. However, committing a little time ahead of a session to discuss a few core points with your co-presenter can make an enormous difference.

Planning roles: Who is doing what?

One of the first things to start with is a discussion of roles and responsibilities. Establishing responsibilities and roles helps prevent that feeling of tripping over and (potentially) contradicting one another.

One of the things we've both learned is to take advantage of supporting roles. Being in a supporting role is important because you'll see how participants benefit most from the content and delivery, as well as what needs to be adjusted.

Typically, one of us serves as the senior subject matter expert and the other assumes the role of color commentator or even the role of participant, asking questions or otherwise prompting engagement.

It's also important to realize that any session is more than just a lecture. Starting, steering, and stopping discussions, activities, and lab work are just a few of the other essential elements to cover and plan with your co-facilitator. One of the most useful and undervalued aspects of any session is scribing or note-taking. Therefore, decide who will document, curate, and organize questions, ideas, and comments.

Example: A workshop we ran involved a lot of facilitated discussion, and the workbook included numerous exercises with a tight timeframe. Based on that, we planned the delivery so that one of us served as the lead presenter and the other as the facilitator and timekeeper. During the session, the presenter led and the facilitator scribed. When it was time for an exercise or discussion, the facilitator asked questions, engaged participants, and managed time, while the lead presenter took notes.

How detailed of a plan do you need? The specificity varies depending on content, the facilitators involved, their experience, and the audience.

Planning cues: Speeding up, slowing down, and switching

When planning a session, particularly with a new co-facilitator or one you're unfamiliar with, discuss cues or tells. What will be your hints or signals for *slow down, speed up,* and *break in*?

Discussing switching and determining any markers for switching are critical parts of having a well-managed session. Cues may be subtle or not so subtle, nonverbal or verbal. They obviously work best if your partner knows what they are. The value of at least one face-to-face meeting with your co-facilitator (even through a virtual tool) provides an opportunity to distinguish nonverbal tells, some of which your partner may not know.

One person asking lead-in or summarizing questions can cue a switch. Better yet, start any summary or leading question with your co-facilitator's name, so they are not caught flat-footed.

Previewing what you will discuss next and summarizing what your co-facilitator has just stated is a little less jarring of a transition for all involved and has the added value of providing a different perspective to participants. Cued transitions are something to consider rehearsing and planning.

In some cases, planning involves timing cues rather than partner cues. For those situations, discuss with your partner some additional cues they can provide in case you don't see the clock, your watch, or any other indicator that it's time to switch.

Example: One challenging session involved a facilitator delivering in a facility with a virtual (and voice-only) co-presenter. They timed the switches using a virtual clock with a blinking countdown as their cue. To help the transition go smoothly, they worked out some cue phrases: "Well, [name], as I wrap this section …" and "Thanks, [name], for sharing that; now I'm going to cover …"

Rehearsing

Although co-facilitators can't practice the exact circumstances unique to any session, they can and should practice many scenarios, rehearsing and drilling key skills and stepping points. Rehearsing transitions often takes you past the *when* of switching to the *how*. Will you move to the back or front? Is there any discussion or summary you can use while switching slides, projectors, or laptops? Walking through those briefly can make all the difference for participants' attention and engagement.

NOTE THAT YOU DON'T NEED TO REHEARSE AND SCRIPT EVERY MOMENT.

Keep in mind that not all co-facilitated classes need to involve switching off. In many cases, it may make more sense for roles to be static and maintained.

Example: Unfortunately, this one comes from a bad experience. The co-facilitators failed to rehearse transitions, so when they switched, they got tangled trying to switch computers and then the slides. Further, because the room was full and there wasn't a second chair, the opening facilitator wound up standing awkwardly while his partner presented.

Other technology-related matters to practice revolve around facilitating in virtual environments.

Example: We were co-teaching a recorded session using Zoom. We had already planned our cues and who would cover what, so at the end of a section the first presenter summarized the content while the other set up a demo. As a final step, the second presenter selected the Switch Host button before picking up the thread. At that point, the second presenter introduced the next topic while the other took notes and asked questions.

For experienced co-facilitators, the practice or rehearsal often is light—a few minutes before the session starts to dry run transitions. On the other hand, when dealing with a facilitator with less experience or whose presentation style you're less familiar with, you'll need a more detailed rehearsal that focuses on cues and transitions.

Note that you don't need to rehearse and script every moment. Instead, discuss matters such as when and how you will come in and when and how you will fade back during transitions. Detailed rehearsals between co-facilitators that involve scripted replies and transitions will often come off as stale. Planning at a high level seems to work better and allow for more fluid transitions.

Delivering and managing co-facilitated sessions

Though we've covered several preparatory tips for making a co-facilitated session better, often in the real world that preparation doesn't happen. Even with experienced facilitators, that can be rough. In almost any situation, though, you can lay out some brief groundwork of planning and orchestration on your own. In such cases, there are several actions you can take even with a totally unfamiliar co-facilitator.

Use the improvisation concept of "the gift." Typically, this is an opening for your co-facilitator to jump in with. A great example of this could be

a leading question—asking something with the answer nested within offers the opportunity for a co-facilitator to springboard off that question.

Example: "Since we are covering virtual technology and there's so much out there about using chat for engagement and Kacy has worked with XYZ technology, I'm wondering if she thinks chat can be useful and has anything to add."

Another tip for unprepped co-facilitation is using summarization. It can serve as a great way to cue your partner to a switch and fill in content from another point of view without overriding or contradicting. Often you can do that as a question or clarification.

Example: "So, Bob, it sounds like you are saying that the first components of the ADDIE model are analysis and design—am I right that we'll be talking about development next? And would you like me to cover this?"

In some cases, when little or no planning or rehearsal is available, it helps to consider more fixed roles, with one person acting as support.

When it all goes wrong

Not all sessions will go perfectly, so we have some tactics and tools to leverage with the most common co-facilitated session-crashers.

The runaway facilitator. It's inevitable that one (or both) facilitators will linger on a favorite topic or area. To address that:

- Ask a question of the runaway facilitator, summarizing the content. Including this as a cue in your planning can also help alert the person presenting.
- Use nonverbal (preplanned) cues from the back of the room.

Struggling facilitators. From time to time, you may find that your co-facilitator will flounder or get lost. Again, if you've planned or rehearsed, this is a situation from which you can easily recover. For example, you can restate what your co-facilitator said or move to a participant discussion on the topic, which will enable your partner to regain composure and pick back up when ready.

Conflict. When facilitators disagree, participants often see that as a negative. But turned correctly, it can be one of the best learning tools for the audience. Position that possibility before the session begins. Point out at the beginning of any co-facilitated session that at some point you both may have differing takes on material and will try to cross-check each other.

If disagreement happens:

- Remember to check your ego. That is a critical before, during, and after tool for co-facilitation, but it applies most when your partner brings something up in direct conflict with something you understand or know or when your co-facilitator corrects you.
- When pointing out a discrepancy, consider doing so with the broadest possible language. Use phrases such as "Another way to look at that is …"
- When your co-facilitator points out a discrepancy, open the opportunity to investigate or clarify on a break. "That's a great point. Let's double-check it on a break and try to either clarify or summarize our two different perspectives."

In any co-facilitated session, the core focus is always the participants' benefit. Co-facilitated courses can be great opportunities for participants to gain great perspectives, resources, and learning—if they're delivered well.

Sean McLean is an ATD-certified Master Trainer for a technology company; seanpmcclean@gmail.com.

Tom Sidebottom is a principal training and certification architect for ServiceNow; tom.sidebottom@servicenow.com.

Building Trust in Uncertain Times

Managers must create, build, and maintain trusting interpersonal relationships to improve business outcomes.

BY TRACY Y. WASHINGTON

IMAGE | WESTEND61/GETTY IMAGES

Because technology drives much of today's culture, it enables people to move at lightning speed to help them become more efficient as companies try to be the first and the best. While most managers trust that technology will transform operations to be more efficient, creating that same trust with team members is not quite as simple.

Human beings have an emtional need to connect. So, if you're a manager who desires to build a high-trust team culture, you must keep in mind that to lead well, both sides must first establish trust. Trust is the bridge that connects people and contributes to business success or failure. Thus, you should be diligent in displaying those trust-building behaviors in your interpersonal relationships—even in difficult or uncertain times when business outcomes are unpredictable.

Trust is the bridge that connects people and contributes to business success or failure.

Relationships first

You should first concentrate your efforts on building strong relationships rather than trying to build immediate trust with your team. *Strong* implies that you should know more about your direct reports than their job titles and work descriptions. When employees feel a connection to not just the job but also their manager, it makes trust easier, and they bring their best selves to work.

In cases where there are economic hardship conditions, layoffs, disciplinary issues, growth, or any change within an organization, having trust helps good leaders successfully navigate through those uncomfortable times. As the refrain goes, people don't leave companies, they leave people. Employees leave companies for various reasons, but when they leave, it is generally because the relationships aren't mutually beneficial, and they don't feel understood or appreciated by their manager.

Siegwart Lindenberg's relational signaling theory states that a person will look for signs in an individual's behavior to determine whether that person is committed to the mutually rewarding relationship. Especially in times of uncertainty, people want to be certain that they can still trust in their organization and their managers. They want to be assured that things are under control.

If management is not effectively communicating—or worse, is evasive—people will engage in unproductive behaviors. If managers haven't invested in relationship-building activities, there's little to no chance of influencing positive team behaviors. Building strong relationships starts with examining three categories:

- communication—imparting or interchanging thoughts, opinions, or information by speech, writing, or signs.
- connection—the way you identify with and relate to people that increases your influence with them and their influence with you.
- chemistry—the interaction between people working together.

Decide the value of changing behavior

When people want to lose weight, they must change their diet and exercise. If they want to save money, they must stop spending and establish a budget. The outcome of changing those behaviors? Better health and more money. The same philosophy applies to building trust.

Managers must evaluate the short- and long-term tangible and intangible costs of not changing behaviors. Trust is not something that happens automatically, nor is it something to think about; you create it only by taking action.

Trust is about making choices daily to engage in new behaviors. It must be earned over time but can be broken in an instant. If earning and building trust is not your priority, what's the impact of leading a team that doesn't work well together? How does productivity suffer when people aren't creative and innovative and bringing their best selves to work? What happens when they don't feel confident in themselves or each other? What if they're not willing to think outside the box or take risks? What if the company is changing its strategy and people are fearful of change and not convinced and motivated to try something new? Those are costs you must consider for not making trust a priority.

In business, trust is the foundation of relationships that lead to business results, and it cannot be ignored in today's economy. Organizations are making pivots, and managers must quickly lead their teams through these shifts. Your ability to recognize team dynamics is vital. While trust is universal, methods of building it vary from person to person—there is no one-size-fits-all approach. Each person on your team has a unique personality and communication style and is motivated by different things.

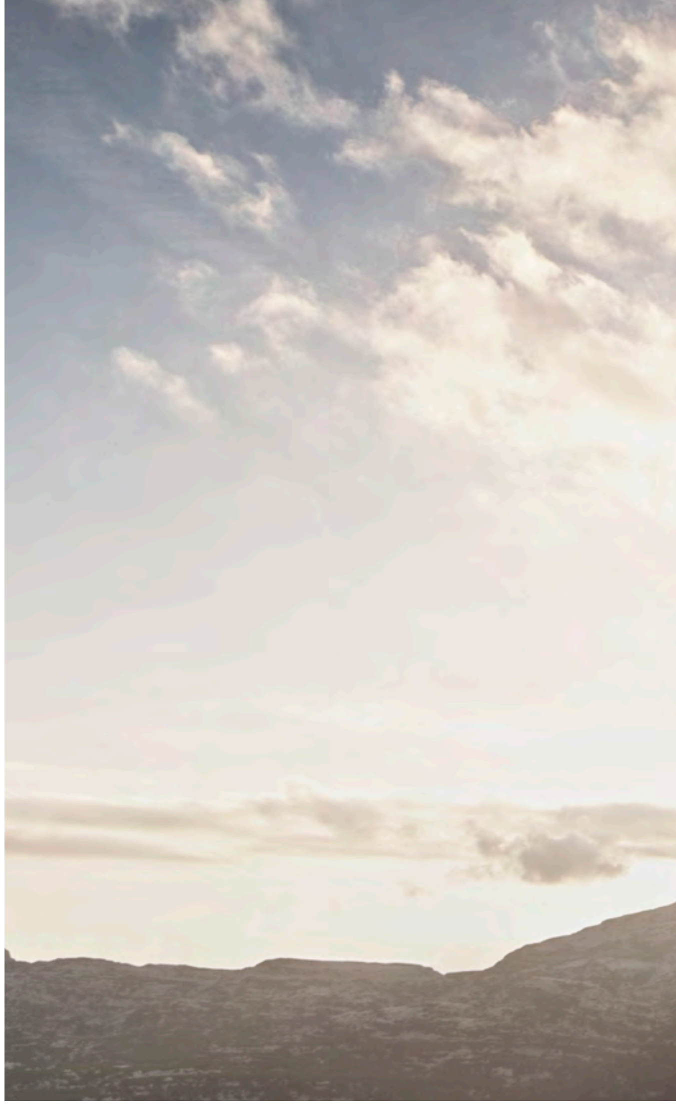
Connecting and engaging with others for influence requires getting to know their wants, needs, and desires. What other areas might they be interested in contributing within the company? Are they holding back and not collaborating? Is it possible they have gifts and talents they have yet to explore in their current role? Are they reluctant to ask for help? Working in silos? Have they lost enthusiasm? Those employee behaviors are signals that trust may be lacking within your team and organization.

Without self-awareness, a person generally sees others the way she is and not as they are. Managers can make the mistake of focusing on others through their own self-perception, then make assumptions that their direct reports share similar values or visions. People are wired and driven by certain things. For some, its money; for others, it's achievement or relationships.

Establish trust by connecting with people where they are, not from your own experiences. Being curious and asking questions without being overly inquisitive is the key. Asking about what your employees care about most or what's important to them is the best way to allow them the space to open up about themselves over time. This takes effort but builds trust and reinforces the relationship.

Sales managers often instruct their teams to ask questions to discover clients' and customers' problems and pain points to provide solutions. In that same manner, all managers should intentionally be seeking and observing relational triggers from their teams to learn more about them. These relationship-building behaviors will help managers connect.

IMAGE | RENELO/GETTY IMAGES



Establish trust by connecting with people where they are, not from your own experiences.

Types of workplace trust

To build a high-trust environment, managers must consider four types of trust.

Organizational trust. People spend a considerable amount of their lives at work and, thus, are looking for meaning and purpose in their work. Although an organization's mission and vision may be clearly stated as part of company policy, leaders must live out the mission and vision through their actions.

As an example, certain apps enable leaders to engage with their employees—via surveys, polls, and feedback—about what's going on with the company, both internally and externally. Such tools help bridge the connection gap, leading to employees feeling engaged and purposeful to the organization and that their jobs matter.

According to a 2018 Gallup study, 13 percent of employees are actively disengaged while 53 percent are not engaged. It's almost impossible to connect with people who aren't feeling purposeful and valued in their roles. Even in hard times, when people feel engaged and connected, good leaders make them feel they can be part of a solution and that their voices will be heard.

Trust in competence. You must demonstrate daily to your direct reports your capacity and ability to manage projects, make decisions, and get things done. You'll achieve that over time as your staff continually see your competence and confidence in accomplishing goals. Likewise, it's necessary that you allow others to see your weaknesses and not pretend that you always have all the answers. That subconsciously gives your direct reports permission to not have all the answers for themselves.

Demonstrate transparency and vulnerabilities to your team by being open and honest in your communications and sharing the why and how behind your decisions. That way, your direct reports will have a greater connection and understanding.

I once was asked at the last minute to conduct a presentation for a group of controllers from different California companies, because the person qualified to facilitate the training had backed out. I didn't know much about accounting but was instructed that I didn't need to know the topic in depth and that I only had to teach the learners how to interpret financial data into nonfinancial language that everyone throughout their organization could relate to.

It was obvious that I was incompetent in my knowledge and understanding of the topic, so there was zero trust from the audience. If your employees can sense your incompetence, they will not trust or respect your ability to lead.

Self-trust. Managers must lead themselves first. Having trust in yourself requires you to believe in your strengths and abilities as well as have an awareness that you're constantly evolving. When you have absolute clarity on your direction, goals, and expectations, it's easier for your team to follow.

If something doesn't go as planned, being comfortable with yourself and admitting you made a wrong decision or apologizing for what didn't go well demonstrates to your team that sometimes you lose and sometimes you learn. Doing so subconsciously builds trust in your employees' minds because of your willingness to be honest and vulnerable.

Some managers can be down on themselves, which can negatively impact their self-worth and self-esteem. Those feelings show up in behaviors and can affect the whole team.

Trust in character. Managers who have standards, values, and conviction to do the right thing—even when it's not popular or easy—show humility. Offering to help and giving others the room to grow and advance is a way to connect and gain influence among your employees. Likewise, showing interest in others' development demonstrates your belief and trust in their abilities and expertise.

Stellar managers will take full responsibility for their team's failures and give credit to their staff when they succeed. For example, a manager of a marketing department took responsibility for a mistake someone on her team made that cost the client thousands of dollars. The manager made things right with the client, made corrections in the processes, and informed the team member of what they could have done differently.

After that episode, the team members' trust that their manager would take care of them grew by leaps and bounds. Managers who show loyalty to their teams will get it back in return through productivity and trust.

Maintaining trust through uncertainty

When the path ahead is unclear, it causes chaos—and leaders must manage uncertainty while being conscious of the impact on the organization. There will always be some level of uncertainty, because change is constant. The key is to minimize disruptions in performance and maintain trust. Here are practical ways to do that.

Share insights. Although there will be details you can't communicate to your team, always share what you can and solicit their feedback to empower them to be part of the solution. Be honest and consistent in your communication, and get to know what's important to them.

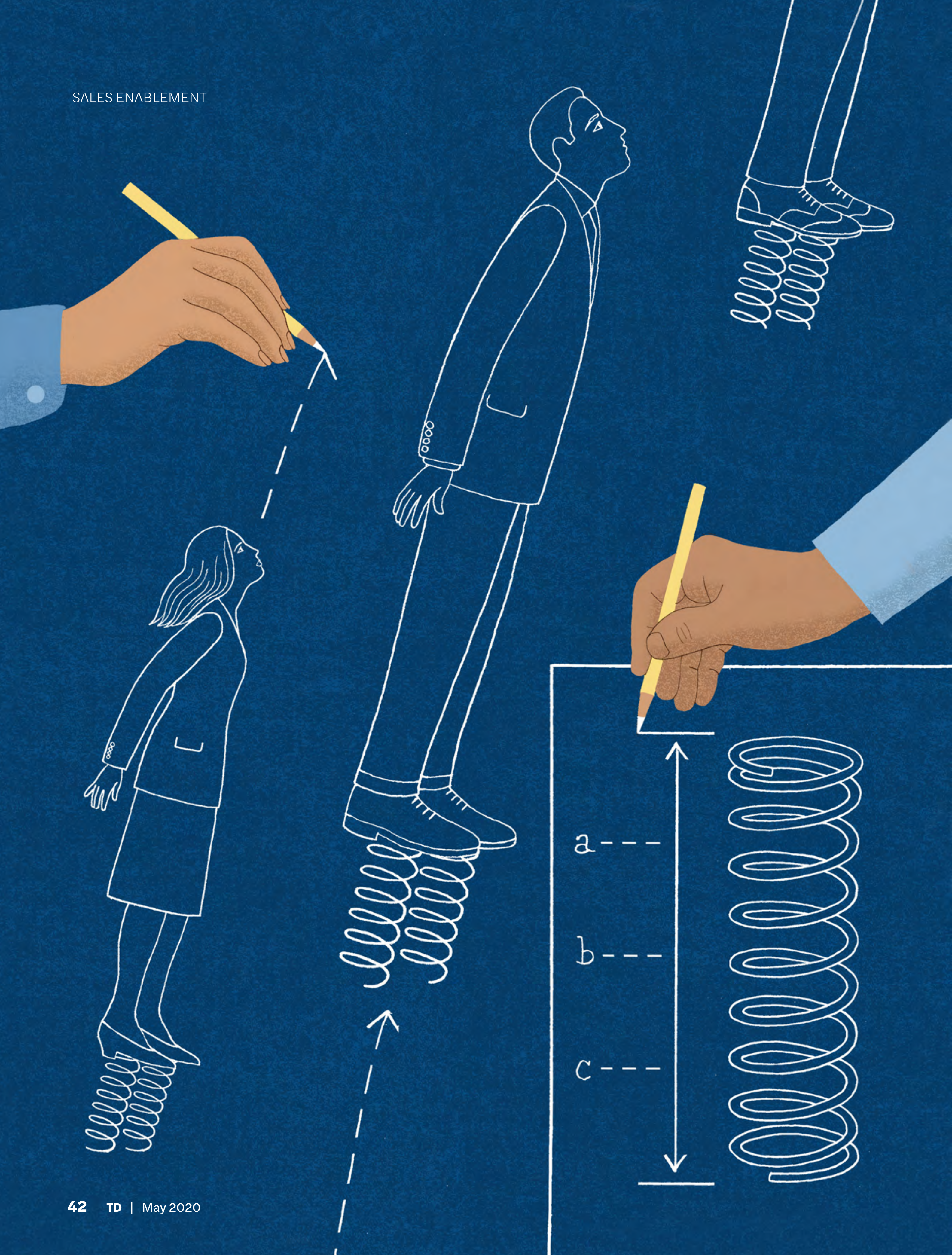
Encourage action. Fear and doubt can paralyze your direct reports when they can't see ahead, which can drive bad behaviors. Help them to evaluate what they can and cannot control and to act on what they do know.

Acknowledge emotions. Uncertainty is uncomfortable for everyone, causing us to feel overwhelmed and anxious. Those feelings are real and should not be repressed, ignored, or denied. Model for your team how to stay motivated in times of uncertainty by openly acknowledging your own emotions.

Stay engaged and remain visible. Your direct reports are looking to you to guide them and lead them to success. Staying positive, visible, and engaged reassures them of your confidence and competence in giving them hope for the future.

Tracy Y. Washington is a leadership engagement consultant, speaker, trainer, and coach; twashington218@gmail.com.

IMAGE | SIMONKR/GETTY IMAGES


a
b
c

A SALES ENABLEMENT BLUEPRINT FOR SUCCESS

Become a strategic business partner for sales leadership by taking a consultative approach to enablement.

BY WHITNEY SIECK

ILLUSTRATION | JAMES STEINBERG

The consulting industry is revered for the value it brings to clients. Consulting firms have proved their approaches over time and feel confident attaching their results to payment agreements. Some of these firms have even created models to ensure that they don't just paratroop in but create sustainable change management plans to drive adoption at scale.

To successfully implement sales enablement initiatives, companies need consultative capabilities such as project management, stakeholder engagement, and change management. Creating a multiplier effect is crucial, and a consultative approach can have a one-to-many impact. In a world inundated with shiny new approaches and technology, one trusted framework proves to stand the test of time—the ADDIE (analysis, design, development, implementation, evaluation) model—and can bring structure to sales enablement. The model has evolved from acting as a linear instructional design approach to ensuring a comprehensive framework of repeatable milestones that can be ideal for rolling out sales enablement programs.

Analysis

When sales enablement leaders begin a new role at any organization, it's important that they conduct a listening tour to understand current-state challenges before attempting to implement solutions. The same is true when addressing targeted business challenges. The analysis phase helps enablement leaders get to the root of the issue and identify the business metrics on which the team is seeking to impact.

Sales leaders often preach to their sellers to conduct a thorough discovery so they can scope the appropriate solution for customers. Likewise, if sales enablement thinks of the sales organization as its internal customer, the analysis step becomes one of the most important ones. Leaders often gravitate toward training as the answer; however, a consultative approach allows for a data-driven response that will determine whether training, a process change, or behavioral reinforcement (coaching) is the appropriate solution. Enablement, as a collaborative function, is in a unique position to also bring to light upstream and downstream operational impact of any changes.

Depending on a company's business culture, the analysis phase can be as informal (a quick conversation with sales leaders) or formal (requiring sales leaders to complete an intake form) as needed. When sales enablement regularly facilitates those types of intake conversations, positive stakeholder behaviors develop as sales leaders come prepared with answers to streamline the process. Questions the sales enablement function should consider include:

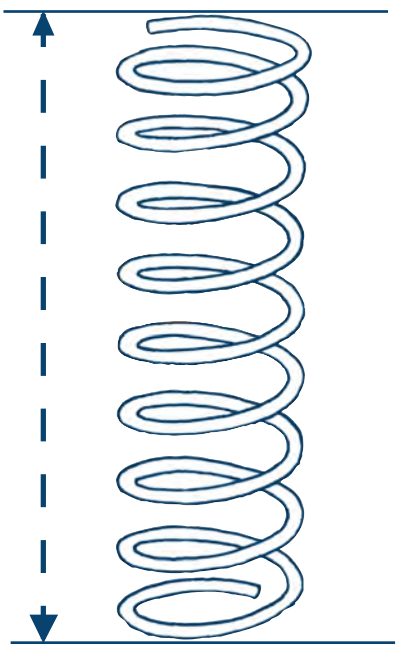
- What is the program goal?
- What are the key objectives?
- Who is the target audience?
- What is the desired timeline?
- What are the available resources for project support (human and existing content)?
- What is the current state? What are the challenges that exist because of it? What is the impact these challenges have on cost, risk, and revenue for the business?
- What constraints exist?
- How will success be measured?

Design

When taking a consultative approach to the design phase, sales enablement leaders must recognize that sales teams typically want to feel like they have had a hand in the process so that initiatives do not feel forced upon them. When it comes to determining modality, I've found it helpful to create a learning preference survey to understand the landscape to inform design approach. With a baseline understanding, the sales enablement function can create repeatable rules so that not everything becomes a training event. (Is the solution something leadership owns—such as process documentation, coaching, or an announcement in a huddle or team meeting—or simply a resource the subject matter expert creates, such as a one-pager of best practices?)

Creating a milestone to present the design proposal and gain consensus from stakeholders will ensure alignment before the heavy lift in the development phase. That way, enablement leaders share the responsibility and do not act as a single point of failure.

Depending on the project's complexity, the process could entail an email or meeting or go so far as to have a chain of approval at key stages. Whichever approach it is, use a consistent design template so stakeholders begin to form expectations of a repeatable process. To smooth the change management curve, consider using a shared project management tool with which the team is already familiar. Here are some design topics to consider for the template:

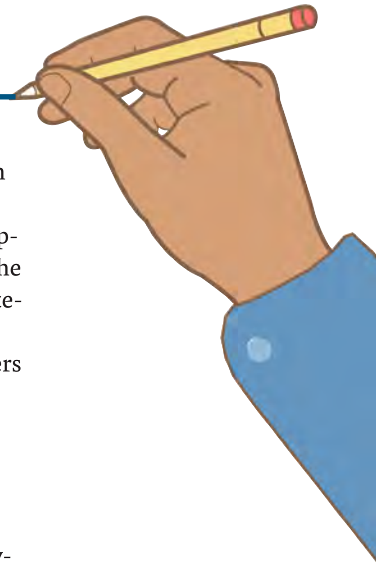


- modules to include (proposed agenda)
- delivery method (modality)
- activity recommendations
- evaluation plan (who is involved in the measurement process and reporting progress)
- reinforcement and ongoing support
- development plan (deliverable, responsible party, timeframe)
- estimated project completion.

Development

The development phase often either involves creating content or wearing a project management hat and chasing contributors to ensure they are properly crafting and socializing all deliverables. It's important to note that, especially for those one-person enablement teams, enablement leaders do not have to be in this process alone. Results are strongest when individuals are not working in silos, so consider strategies that involve SMEs or crowdsourcing. Or assemble a sales council for rep-level feedback (see sidebar). In my organization, the council has evolved over time to foster more strategic SME programs.

WORK WITHIN THE SALES TEAM'S NATURAL OPERATING RHYTHM AND THINK STRATEGICALLY WHEN PLANNING A ROLLOUT.



A tactical example of where enablement partners with rep-experts is in onboarding. I also involve large cross-functional groups in solving complex challenges. I run crowdsourcing workshops to establish best practices and understand the team's current-state behaviors. The information from these sessions often becomes the content for playbooks created by the team, for the team. With that level of buy-in, adoption rates soar.

Implementation

Just as when implementing technology, enablement leaders shouldn't turn an initiative on and let it go. Establish a programmatic approach to create milestones for cascading communications, clear expectation setting, and an aligned and informed working relationship with key stakeholders. Like any change management effort, this will take time to become a norm, but stick with it, because the benefits will be worth it in the long run.

In addition, don't skip the sales manager enablement step. More often than not, managers are lumped in to receive training at the same time as their teams. Create a manager or coach milestone to ensure managers are content experts and can voice their concerns and frustrations in a safe place. The alternative risk is for managers to be combative in front of their teams and for the initiative to lose credibility.

Because sellers are creatures of habit, work within the sales team's natural operating rhythm and think strategically when planning a rollout. Sellers often have a repeatable cadence as they work toward monthly or quarterly quotas. Other activities—such as weekly team meetings, quarterly business reviews, and morning huddles—are standard at most organizations, so use those existing meetings as communication mechanisms versus reinventing the wheel and creating something new.

How to Start an Effective Sales Council

A council comprising sales team members will help sales enablement leaders collect feedback directly from stakeholders.

Create a charter. Document the council's goal and provide clear expectations of the time commitment and types of activities. This exercise will ensure that cross-functional partners work with the council in the most effective way. Be sure to highlight the personal motivators to attract participants. The roles should be a rotational honor that's reevaluated on an annual basis—bonus points for aligning to career ladders.

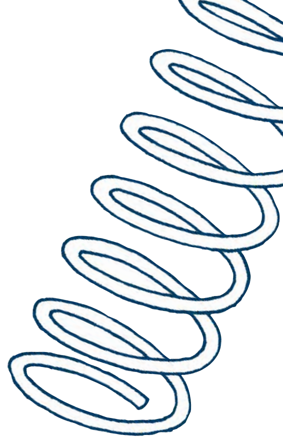
Identify an executive sponsor to ensure structure. It's crucial, especially while working through change management with this newly formed group, to have a single point of contact who ensures the meetings are a productive use of time and keeps the team focused on solution-oriented ideas. The last thing you want is to have this time turn into a venting session. Sponsors can help prioritize the agenda and provide guidance on how to operationalize ideas. Sponsors should make a conscious effort not to filter or influence the team's feedback, which defeats the council's purpose.

Use a nomination process to elicit participants. This team is meant to represent the seller's voice, so it's important the salesforce feels it had input in the process. Use a crowdsourcing method to receive nominations. Have the leadership team strategically review the nominations to ensure diversity in race, gender, role, segment, and tenure. Varied perspectives are helpful in crafting a comprehensive initiative that the sales team will widely adopt.

Socialize cross-functionally. After the council's formation, have the executive sponsor conduct a roadshow with cross-functional partners to review the charter and answer any questions regarding scope of support and process for engaging the group. Understand potential use cases to expect with each department. If it makes sense based on the purpose of your council, consider aligning the group in a committee style where representatives are matched with key partners in the business. Someone owns the demand generation relationship, someone else owns product marketing, and someone different owns collaboration with product marketing.

Include council members in strategic initiatives and large-scale presentations. Because peers nominated the council members, they are likely cultural pillars of the sales team. I've found that when you leverage staff to be the champions of important initiatives, adoption becomes significantly easier. Including stories from the field in rollouts and project updates and recaps creates authentic credibility and builds the sales team's confidence.

Recognize participants' efforts. For sellers, any time off the floor can have an impact on their financial drivers. Providing recognition for their extra effort and tying their contributions to a larger impact on the company will help them stay motivated to continue providing their valuable perspective. While this group is formed with productivity in mind, it doesn't hurt to have a little fun. Consider treating the council as a sub-team of its own that can benefit from team building and social bonding. This will also make the role more enticing for the next round of participants.



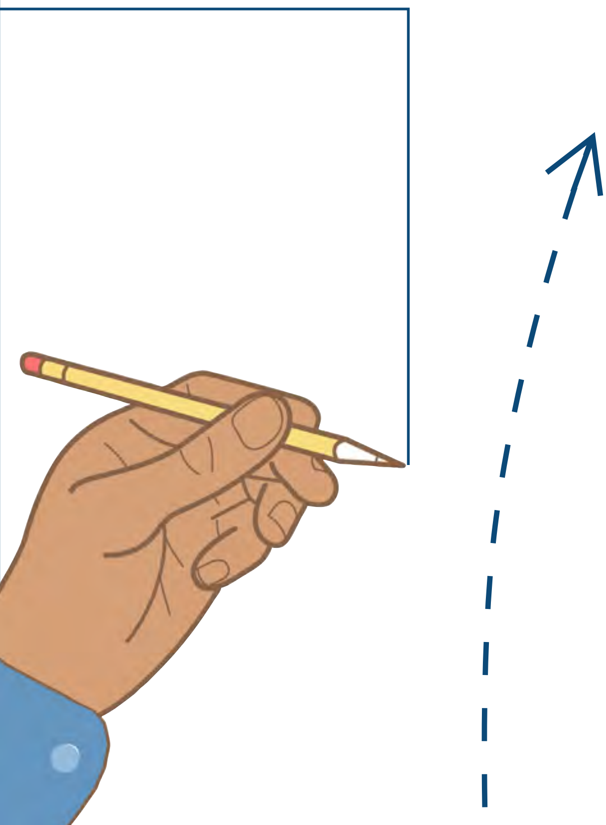
Evaluation

As with any project, start with the end in mind. Sales enablement's ultimate goal is to grow sales. The only way to prove enablement success is to tie it to tangible results. Typically for enablement leaders who started in sales, the challenge is that they skip from "Did the sellers enjoy the training?" to "Did it have an impact on the business?" That jump makes it difficult to judge what's working and what's not and to directly correlate enablement's impact.

There's another classic learning evaluation framework, the Kirkpatrick model, that helps ensure that the sales enablement function is measuring knowledge retention and the initiative's adoption. The model outlines four levels of evaluation and notes that not all levels are needed for every project, so it allows flexibility and strategic tiering.

Level 1 outlines the seller's reaction. This usually comes in the form of a survey to ensure the information was comprehensive and resonated with the team. Consistency is key in comparing results of one initiative to another; don't reinvent the wheel every time.

Level 2 describes the knowledge retention. In sales, it's crucial that learners practice the skills and not just absorb the information. Incorporate practice using a variety of formats such as role plays, quizzes and knowledge checks, or more formal certifications.



Level 3 is around behavioral adoption. Many people avoid this stage from a measurement perspective because it's challenging to track and often reliant on frontline manager support. However, this is the most important stage to ensuring that the enablement initiative was worth the effort and not just a point-in-time event. During this step, the sales enablement function can support reinforcement communication, develop manager enablement content such as coaching guides or activities for team meetings, and identify ways to optimize the tech stack to drive the right behaviors.

Level 4 focuses on business impact. In the analysis phase, sales enablement leaders should have determined areas of intended impact (leading, lagging, and lacking indicators). Watch the results over time, because it often takes more than one quarter to move the needle. Use those results to capture impact stories and share those upward in the organization.

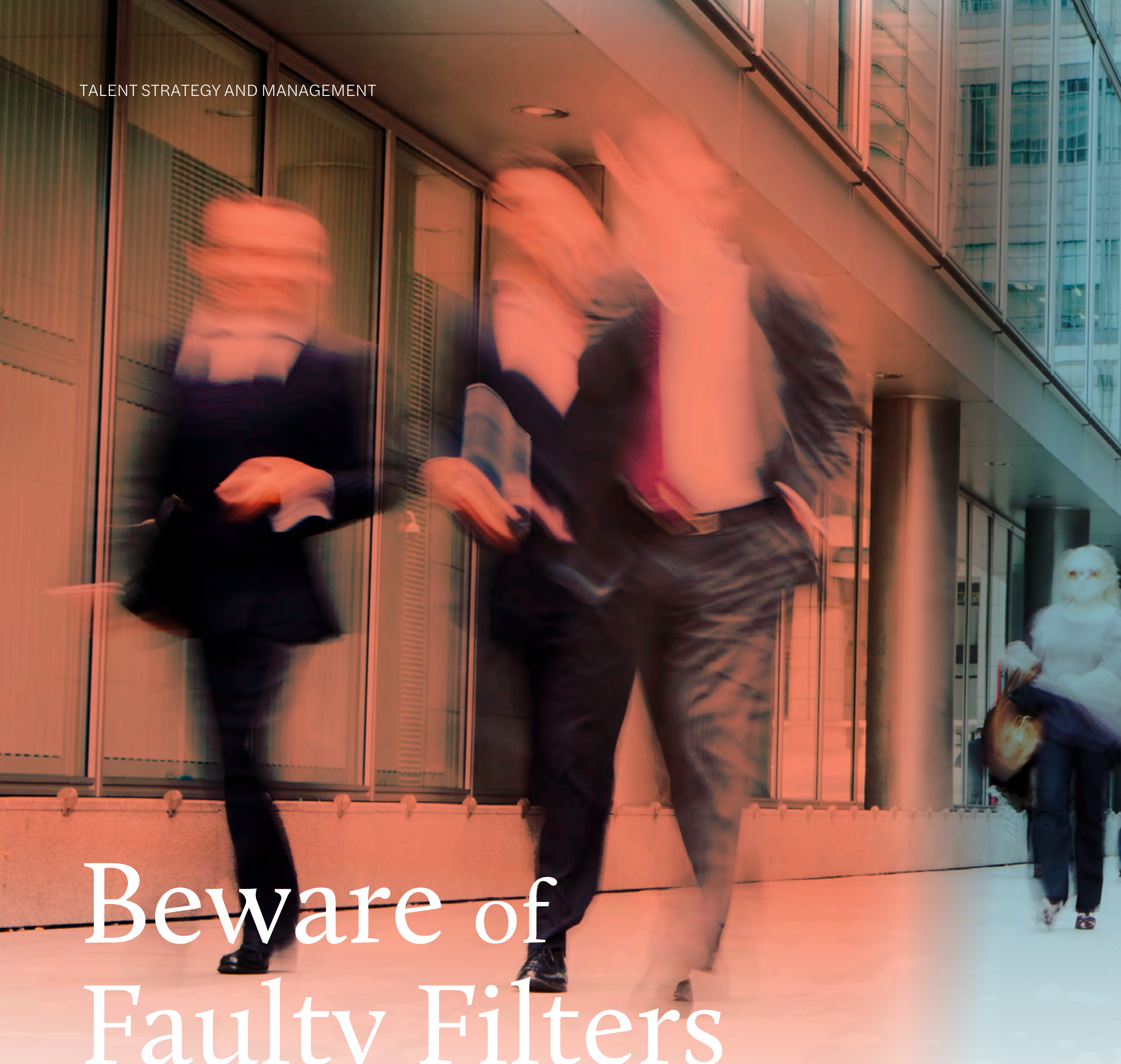
The sales enablement function often can feel like the unsung hero, and I've made it my mission as an enablement leader to ensure my team feels recognized. I craft impact stories that briefly outline the initiative's purpose, process, and payoff. Executives are storytellers, so providing them the material for their next company-wide presentation goes a long way.

Because sales leaders are our internal customers in our consulting model, my team has established a quarterly business review for enablement stakeholders to give updates on results and progress. These occur midquarter as to not compete with the existing sales operating rhythm. Using the Kirkpatrick model as a programmatic framework to measure success and creating the space to share these stories will help drive alignment and strengthen partnerships.

A consistent operational framework

ADDIE provides a great framework for the sales enablement function to act as a strategic consultant for the sales leaders, but ultimately an enablement leader's consultative capabilities will drive the function to transition from reactive to proactive and empower teams at large to operate as a learning culture. Creating a consistent operational framework will enable the sales enablement function to achieve maximum impact that the organization will capture, share, and recognize.

Whitney Sieck, CPLP, is a senior talent development specialist in the greater New York City area; whitney.sieck@greenhouse.io.



Beware of Faulty Filters in Your Hunt for Talent

BY BEVERLY KAYE, CONNIE BENTLEY, AND LINDA ROGERS

Open minds close open positions.

Horace is driving a decrepit old car through a rural area. He brakes suddenly when another driver comes hurtling around a sharp bend in the road in a large Rolls Royce. The driver sees him, shouts "Pig!" at him, and drives past. "Cow!" he yells back in retaliation and heads around the bend himself, crashing head-on into the biggest pig he has ever seen.

IMAGE | TRACK5/GETTY IMAGES

If that old story elicited a chuckle, good. We hope it will lead you to wonder what caused Horace to mistake an innocent warning for an insult: Was it his assumption that the driver of an expensive car would view him with contempt? Did he have a previous experience driving through that neighborhood? Was it his bias against people who shout at motorists?

Yes, yes, and yes. Each of those is a mind filter.

If Horace had avoided those filters, kept an open mind, and viewed the situation through a less cloudy window on the world, he may have had a more informed reaction, been more receptive to the other driver's warning, and ultimately steered clear of the pig.

Unlikely as it may seem, that story provides a valuable lesson for executives and line managers looking to fill open positions. Why? Because Horace's filters are similar to the ones that can cause leaders to set inaccurate job requirements; create biased profiles of an ideal candidate; place unwarranted importance on one type of skill, education, or behavior over another; or inaccurately view and prematurely dismiss highly talented candidates.

In the words of writer Isaac Asimov, "Your assumptions are your windows on the world," and they make up the lens through which individuals view events, people, relationships, decisions, and so much more. As such, they help explain both what caused Horace to misinterpret the meaning and intent of "Pig!" and what leads executives and managers to sabotage their own talent hunts. But they do not address the more important issue of how to avoid the filters that cloud perception in the first place. The answer, however, is fairly simple. It starts with having an open mind.

An open mind is one that is free of the faulty filters, assumptions, biases, and partisan beliefs that can misshape opinions, skew attitudes, and cloud objectivity. In the corporate world, it is ostensibly valued, desired, and even demanded—too often by those who don't demonstrate it themselves. This may be because developing and maintaining an open mind requires work.

From our experience, we have distilled a few ideas for opening the minds of those who are trying to fill open positions.

Notice what you notice

One of the first steps toward an open mind is to develop an awareness of what may be closing it. A good way to begin is to simply notice what you notice. It's a practice you can exercise on the job and is a useful way to identify filters that could potentially prevent your neutral, objective consideration of potentially valuable additions to your team.

As you go about your day, pay attention to anything that stands out in your mind above others. Be aware of your first impressions and reactions—positive or negative—to certain words, smells, sounds, ideas, language, apparel, hair styles, labels, titles, and so on. See the table below for examples, and add your own observations and reactions.

Gauging Your First Impressions

What I Noticed	My Reaction
• Tattoos and piercings	• Well, that's a deal breaker.
• Erik's brother plays football for the University of Southern California.	• Erik is probably a high achiever too.
• She has two PhDs.	• That would look good on my org chart.
• He has no university degree.	• That's a nonstarter.
• She wasn't born in the US.	• The US market is different from any other.
• English is his second language.	• Any accent is a negative.
• She spent her entire career at one company.	• Moving to a new company will be too hard for her; her perspective is too limited.
• This would be a lateral move for him.	• He would leave as soon as he found something better.
•	•
•	•
•	•

If you are like most of our clients, you will discover a few reactions that could potentially—and faultily—affect one of your selection decisions. If so, what can you do to adjust them? One way is to use the table to record your key observations and reactions to the next candidate or resume you see, then answer these reflection questions:

- Why did I notice what I noticed or react the way I did?
- What alternative reactions could I have?
- Would my colleagues react the way I did? Why or why not?
- Would what I noticed impair the candidate's job performance in this role?
- How valid is my reaction to what I noticed? Do I have data to support it, or is it a possibly faulty assumption?
- Am I judging this person by a set of standards the individual does not share? If so, is it a set of standards that reflects my company's values, a set of standards that is relevant to the job requirements, or just my personal set of standards?

Ask more questions and question more answers

At every stage of a talent hunt, executives and managers risk looking through any number of faulty filters that could negatively influence their decision making and unnecessarily lengthen their search. As talent hunters, they are initially motivated but often in a hurry to answer key questions about the job opening. And filters, unfortunately, offer handy shortcuts.

As a result, answers to "What are the job requirements?," "What does the ideal candidate look like?," and "Where should we search?" tend to reflect those filters. And the more filters there are, the less information gets in. The less information there is, the faster managers can process it. The faster they process it, the sooner they can make a decision. And the sooner they decide, the quicker the job opening will close. Makes perfect sense, right?

Only until you fast-forward to the point where the original questions invariably morph into tougher ones such as "Why are there so few qualified candidates?," "Why didn't somebody mention this in the beginning?," and, ultimately, "Why is this taking so long?"

Sound familiar? If so, try asking the following questions before or during your search.

Whom should I consult before writing the job requirements and candidate profile? Inviting others to contribute to the "pre-search" could not only broaden your perception of what you need but also help clear up any unconscious filters you have in place. It also enables you to look beyond information that simply affirms what you already think.

Clearly, there are valid reasons for eliciting opinions and input from others in preparing job requirements and candidate profiles, but which others? Every situation is different, but here are some possible contributors to consider:

- **Team members.** Ask them to describe the overarching team process the new hire will be part of and that individual's role in it.
- **Customers.** If you are trying to fill a customer-facing role, who better to consult about job requirements than those who chose to be your customers?
- **Job analyst.** If you have people whose role is to determine a position's duties and the nature of performance evaluation, by all means consult them.
- **Current job holders.** These individuals may provide valuable insight into what their typical day looks like, their role relative to others in the process they're involved in, the key issues or problems they face, how to handle or avoid them, and more. You can even ask them how to revise the current job description to better reflect what's really happening in the role.
- **Your supervisor.** This person provides a good reality check and a fresh set of eyes.

Be aware of your first impressions and reactions—positive or negative.

How many of my must-haves are there? The dictionary definition of *must-have* is "an essential or highly desirable item." So, which is it? Must-haves are excellent ways to limit your talent options.

Hard-and-fast candidate filters almost invariably leave you upstream without an *or.* Plus, the trip back to dry land can add hours or even days to your talent search. To avoid that, examine and add an *or* to your must-haves. For example, the candidate must:

- Have experience in our industry *or* demonstrate how their other-industry experience can add value to our business.

The importance you place on certain characteristics can reflect a filter you don't even know you're using.

- Leap tall buildings in a single bound *or* leap smaller buildings but more of them.
- Come from outside our firm *or* not.
- Live close enough to be in the office every day *or* be willing to [fill in the blank].
- Have worked in a startup *or* demonstrate an entrepreneurial mindset.
- Have an MBA *or* rich business experience with demonstrated accomplishments.
- Have worked in a publicly traded company *or* in a company that governed itself using the practices of a publicly traded company.

What are my assumptions about the ideal candidate and how realistic are they? Thinking that candidates can easily fit into neat classifications limits your thinking and makes it far too easy to eliminate potentially high-caliber people. It also causes the search to take longer than it should. Be honest with yourself: What more realistic requirement could you set?

What am I not seeing? Candidate interviews are where faulty filters most often rear their ugly heads. Open-minded people know they are not all-knowing. They realize their perception of someone is more complicated than they consciously realize, so they are more inclined to seek out and understand alternative perceptions. This effort itself expands their minds and leads them to re-examine opinions, assumptions, and filters—theirs and others'.

Remember that people and their experiences are nuanced, and this fact alone makes them worth noticing rather than dismissing. Ensure that your selection process involves more interviewers than yourself.

Why did I think that last candidate (or resume) was perfect (or awful), when no one else did? That is probably one of the best questions to ask if you want to uncover unconscious filters. Did you give the candidate more points for certain experiences than other interviewers did? If so, why? Did you give the individual fewer points for certain resume features than other screeners did? If so, why?

To help you avoid potential filters, try having someone remove the name, address, educational degrees, and age- and gender-indicating information from the next resume you scan. Then, after you've made a go or no-go decision, re-read it with the missing information included and see whether you discover anything interesting.

How important is it? The importance you place on certain characteristics can reflect a filter you don't even know you're using. Are the requirements you set critical to doing the job, doing the job well, or doing the job perfectly? Your focus on perfect versus very good may be a filter—and it could make a difference in how long it takes to fill an open position. A question closely related to that one is next.

Am I in more of a hurry than I need to be? Probably. One of our favorite axioms is "Crawl to conclusions." Here are some others: "Speed is inconsequential if you're headed in the wrong direction." "Good, cheap, or fast. Pick any two." "Speed kills."

Build to suit

We believe there is a must-have question to ask in any critical talent search, one that deserves to be called out separately: What would I do if I had to fill this position with a current employee?

If you are like most of our clients, that question sends chills up your spine. But the exercise of answering it can be critical in overcoming what we call the NIMBY filter. NIMBY is an acronym for the phrase "Not in my backyard" and is a characterization of resistance by residents to planned developments in their local areas. In our experience, it is also an attitude that is alive, well, and causing many organizations to miss some of their most promising—and easy-to-access—talent resources. And it is a filter that is easy to avoid. How? By planning developments in your local area.

Our client work suggests that too many of today's managers know more about job candidates' abilities than they do about their own workers. Therefore, start by becoming more familiar with your team members' current capabilities, potential, and career goals. Approach your employees with an open mind; discover and consider how to leverage their existing potential; and explore how each of them could be coached, trained, or provided with tools and experiences that could help them become the talent you will one day be searching for.

Filling open positions with current employees does not mean creating something out of nothing. It could simply mean building on property you didn't realize you had.

As vexing as the above questions may be, they will hopefully help you to develop more informed reactions, consider more options, re-examine your assumptions, become more receptive to potentially valuable talent, and ultimately steer clear of pigs in the road. On the other hand, if you have concluded that you have no faulty filters, we'll leave you with this final question: What were your initial assumptions of Horace upon reading the first sentence of this article? Why?

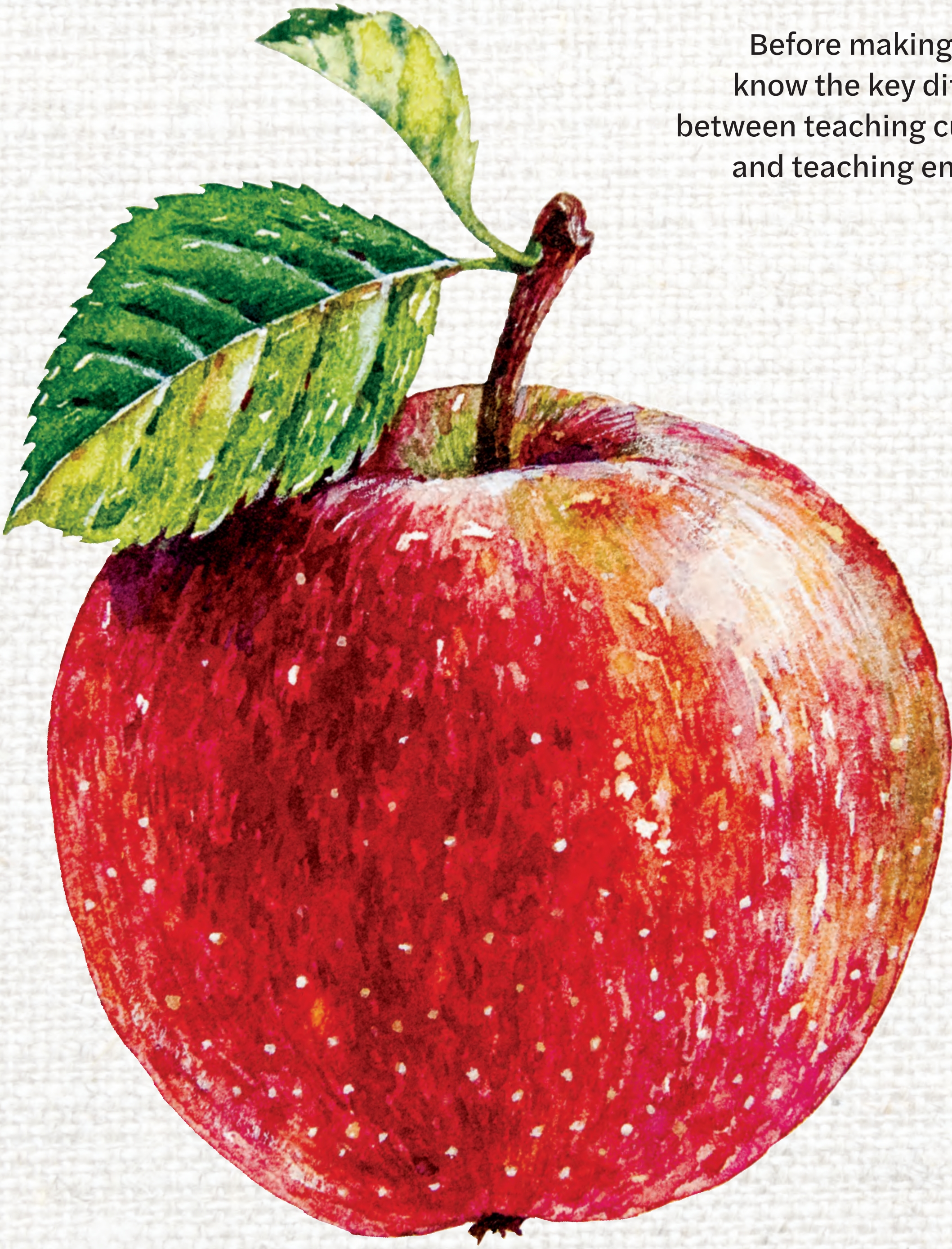
Beverly Kaye is an author, speaker, and consultant and received the ATD Lifetime Achievement Award in 2018; bev@bevkaye.com.

Connie Bentley is founder and president of CMB Consulting; cmbconsulting@conniebentley.com.

Linda Rogers is an internal communications and training consultant; lrogers58@icloud.com.

Differentiating Customer Education

Before making the leap, know the key differences between teaching customers and teaching employees.



From
Talent Development

BY ADAM AVRAMESCU AND DAVE DERINGTON

IMAGES | ADOBE STOCK

As the field of customer education emerges alongside fast-moving SaaS businesses and technology companies, talent development professionals find themselves exploring careers in the field. How different is customer education from the average TD role? Many experienced TD professionals would argue that there's no difference aside from the intended audience. In our experience building and leading customer education teams, we've found some key differentiators.

Customer education's role

Today's customer education function is relatively new, growing alongside the emergent customer success field. Customer success itself grew out of a need for account management in the subscription economy: Because customers are constantly renewing their subscriptions after an initial sale, customer success managers must constantly prove value sufficient to earn the customer's renewal. Thus, the typical customer success team cares about metrics such as an account's product adoption and retention rate. The goal is to expand product adoption and avoid churn, which means a reduction in spend or cancellation.

Every account has a story to tell; several factors precede a customer's decision to renew, expand, or churn. Namely, if customers find more value in the product and have a frictionless support experience, the result is higher usage and customer satisfaction scores. Individual customer success managers can influence those metrics but often at great cost and manual effort. Meanwhile, customer education programs can influence those metrics at scale, providing efficiency for the business and a more consistent experience for the customer.

While customer education typically aligns directly to customer success teams' goals, it also can drive increased awareness of the company's product—or, in the case of companies operating in emerging industries, awareness of the industry itself.

For customer education professionals, this new approach to the customer life cycle encourages us to find ways to help customers adopt new product features, mature their usage of our products, and expand into new use cases or business lines. At times, our jobs look less like a traditional instructional designer's job and more like that of a product marketer.

That said, our field isn't completely novel: We draw upon skills that many TD and education services professionals have in abundance. After all, whether we're conducting onboarding training for new accounts, creating online academies, or producing in-app education for just-in-time performance support, we draw upon time-honored instructional design strategies.

Reaching customers at scale

Customer education audiences range from prospects evaluating a product to new customers getting their bearings to experienced customers looking to increase value or build their careers. Unlike typical L&D teams, customer education professionals invite the opportunity to teach a variety of learners outside their walls. These programs will evolve as companies mature from startup to established businesses.

For many startups, customer education emerges from the support function, because customer support at a startup can be all hands on deck, with everyone pitching in. Companies invest in customer education for the first time because there is no central owner of the ad hoc training and documentation that is already happening.

At a startup, customer education professionals are tasked with helping transition these early support agents from accidental trainers into subject matter experts. The main goals are product adoption and support efficiency, by helping motivate customers to use the product more effectively and reducing the most common support ticket categories. As a talent development practitioner, your instructional design and knowledge management skills will come in handy here because you'll focus on learning outcomes and move away from a content-centric approach.

If you join a customer education function in these early days, expect a blended, generalist role where your team may own anything from knowledge base articles to tutorial videos to training webinars or live courses. One pattern we commonly see for companies in the early stages is blending the most- and least-scalable modalities. For example, a company of 100 employees may be serving public-facing help center documentation and tutorial videos to thousands of visitors while also conducting ad hoc classroom training to audiences of five or fewer. Often the emphasis here is on speed—"fail fast and learn" is a common mantra.

After all, the entire company is likely undergoing rapid experimentation to see what resonates with learners. Expect little in the way of formal instructional design and instead focus on how you can use key learner-centric design principles to test content and approaches.

As companies mature and invest in more defined customer education functions, you can expect more process and predictability. While your product adoption and support deflection goals will persist, you may also find yourself focusing on driving customer maturity and eventually on the delivery of revenue-generating programs such as training services, certification programs, and premium content subscriptions.

As companies grow, their customer education programs tend to evolve into education services teams that provide paid training through a statement of work, making the job like that of a consultant. Polished discovery, development, and delivery skills are paramount. On the content side, larger businesses may also offer paid content subscriptions or broader learning platforms such as Salesforce Trailhead, a curated learning program for developing job skills. Instructional designers serving such businesses can expect to take on an editorial function due to the large volume of content to create and update.

Across many companies' lifetimes, the focus will shift from growing and building the business to scaling the business and finally to delivering services that protect the customer's investment. In addition to the company's maturity, the modalities you'll use will also depend on your customers' personas.

Content development for customers

In keeping with the trend toward microlearning, typical customer-facing audiences are pressed for time and often look for concise content that solves a problem. Unless you work at a company delivering long-form training services or certification courses, you will typically be focused on more modular content that customers can access just in time. For that reason, customer education teams may be tasked less frequently with instructor-led training than with formats such as help center articles, tutorial videos, and in-product education.

Rapid development e-learning and video production skills will come in handy, as will the ability to tailor job aids and other written material to adhere to your company's brand. You'll need to grasp design principles and visual polish for customer-facing audiences, unless your team has a dedicated visual designer. As for in-product education, customer education teams typically author them using digital adoption platforms—systems that enable you to create step-by-step walkthroughs and tutorials that appear directly in the product.

Such formats lend themselves to on-the-job usage, especially for distributed user bases that aren't expected to attend an initial training. Think about the way you've learned software products: How often do you sit down in a classroom for long-form learning? Likely less often than you've tried to accomplish a few tasks before deciding to look for help.

For TD professionals who have experienced authoring documentation, help articles, and contextual performance support, these formats may be familiar. As with corporate learners, it's essential to author content that meets an on-the-job need. You may have to train customers on brand-new feature X, but pure feature training is often less beneficial than workflow-related training.

In other words, how will customers interact with your product on a day-to-day basis to do their jobs? Of course, you will still introduce product features, but by packaging that dull content within a job-based workflow, you'll help customers achieve their goals without the tedium.

Finally, instructional designers and content developers working in customer education often find themselves needing to rapidly embrace Agile development methodologies. The traditional waterfall approach (such as ADDIE) often doesn't work for companies with continuous product development cycles. By focusing on rapid development and iterative approaches, you will be able to keep content aligned to product updates.

Because software products change constantly, many customer education organizations use time to delivery as a key metric for content. Although it's important for quality to remain high and brand standards to be met, customer education teams must embrace a mentality of *test, learn, iterate* to evolve content as the product itself evolves and to be comfortable with putting imperfect solutions in front of customers to invite feedback. This makes customer education more conducive to Agile development strategies such as SAM (Successive Approximation Model) or LLAMA (Lot Like Agile Methods Approach).

Using data to prioritize and optimize content

In the TD world, you may not always have the data you'd like, but at least you work in the same organization as your learners. How do you gauge what learners need when they don't work with you?

First, listen to the customer's voice. Many people in your organization are already educating your customers. Customer success managers, implementation and onboarding teams, and support teams all have some perspective on customers' top pain points, which can (and should) inform your priorities. Gather this information by interviewing and even shadowing some interactions with customers. Some companies record their calls, meaning that you have an on-demand resource to mine for knowledge.

Support teams commonly leverage ticketing systems, which provide a wealth of information. By analyzing support ticket categories, you'll discover where customers are asking for help. The categories that generate the most requests will inform your learning outcomes. Focusing your educational efforts on those issues will generate meaningful (and quantifiable) help for customers.

Customer education teams can also use web analytics and marketing data to prioritize content. After all, not all customers are using your product—yet. Unlike corporate learning, customer education is often delivered on the web, ungated, to wide audiences.

When serving a distributed audience of customers, it's challenging to measure learner behavior. Behavioral data is often captured as product telemetry, which refers to tracking of customers' actions within a software product. This data is often limited to actions such as logging in or using a particular feature. But it's usually enough to infer that a customer has learned something if there is correlation between a learning event and product usage afterward. Customer education teams frequently work with product management teams to gain access to product telemetry and link it to learning data in the same reporting system.

Customer education professionals can optimize content over time by measuring discoverability and value. Discoverability means, "Did a customer find what they need when they need it most?" Value asks, "Did they get value out of it?"

Discoverability is assessable in a couple of ways. If the company has a learning management system, the customer education team can easily measure enrollment and activity by module. If the organization uses web analytics tools, the team can measure page views and other metrics.

Value can be assessed through traditional course surveys, as well as through web-based survey modules and upvote/downvote mechanisms. Survey data and high levels of engagement are proxy metrics for the value of learning material.

> Unlike typical L&D teams, customer education professionals invite the opportunity to teach a variety of learners outside their walls.

By finding proxy metrics for the two of these, and combining them, customer education professionals can make decisions about each course, article, and performance support module. Finding the discrepancies between value and discoverability can help them optimize. For example, items with high discoverability and low value should be the priority to edit or update, while items with high value and low discoverability should be promoted more heavily.

Exploring new paths

Customer education can provide interesting, diverse career paths for experienced TD professionals. In many cases, you will combine the skills you have acquired in instruction with a lens toward customer success to reach new audiences in new modalities.

Adam Avramescu is head of customer education and training for Checkr and a co-host, with Dave Derington, of the *CELab: The Customer Education Lab* podcast; adam.avramescu@gmail.com.

Dave Derington is senior manager of Outreach's customer education program; dave@derington.net.

Embracing a Coaching Culture

BY DERRICK THOMPSON

Leadership development is a rising priority for organizations, as evidenced by findings in the Brandon Hall Group's latest Impact of Leadership Development Study. Conducted from September 2019 to January 2020, the study found that more than half of the 240 respondents plan in the next two years to increase their focus on coaching and mentoring at all levels as part of their leadership development efforts. That is an especially noteworthy finding because leadership development and succession planning failed to chart as among the top 10 priorities in previous Brandon Hall Group studies.

While talent development professionals have long advocated for increased investment in leadership development, now that it is rising in importance among other stakeholders, the question becomes how to do it and measure its impact. To do so, more and more organizations are shifting from traditional leadership development principles to a coaching culture.

So, what does a coaching culture look like? According to Brandon Hall researchers, a coaching culture emphasizes seeking and listening skills, versus telling someone what to do; provides greater agility to solve problems across the enterprise; and creates space for daily coaching moments and conversations between leaders, teams, and peers.

As the shift becomes more prevalent, those looking to embrace a coaching culture as part of their overarching leadership development plan can benefit from the advice of established leaders. A CEO, CFO, and senior people scientist shared important insights as to what establishing a coaching culture requires, pitfalls to avoid, and high-level benefits to expect from this brand of leadership development.

Make the time

It is an accepted truism that the quickest way anywhere is a straight line. Coaching, however, is anything but a straight line—that's because in the process of developing leaders, coaches must take time to strengthen their mentees' critical thinking skills. According to Jessica Brannigan, senior people scientist at Culture Amp—a technology startup that helps companies with employee feedback—inspiring critical thinking requires time to understand the mentee's thought process.

"Taking critical thinking back to its origins, both leaders and coaches have a clear competency requirement to ask deep questions, which allow them to uncover underlying thought processes," she says, adding that it is just as important for leaders to understand why their team is proposing a particular strategy as it is for coaches to understand the way their mentees think.

"In both cases, they are tasked with asking the right open questions of their subject to enable them to appreciate the assumptions which underlie conclusions reached and support them to come up with possible alternative approaches or lines of thinking."

Time as a critical obstacle to leadership development shows up in myriad forms across organizations small and large. Taunya Conte, CFO at MadCap Software, a multichannel content authoring and publishing solutions provider; and Mike Kallet, CEO of Headscratchers, a company that hosts critical thinking workshops for leadership and management development, agree. They note that time is a barrier in the sense that many leaders have a natural propensity to find the quickest solutions to issues, which isn't always optimal for mentee development.

"We like to help, and if we have experience in something that we're coaching, we tend to tell people what to do and we give them the answers," Kallet explains. "[There is] nothing wrong with helping, but if you ask them open-ended questions that force them to think, they will learn the questions they should ask themselves the next time."

Conte admits that her coaching gap presents itself when she's too focused on a particular task. "Oftentimes, I find I am more concerned with getting the job done quickly and right the first time," she states. "I should be spending my time coaching/teaching other team members how to accomplish the task at hand."

Investing time in helping mentees become better critical thinkers also yields confidence—an essential leadership trait. "Instilling confidence in the employee is one of the key competencies of any leader and coach," adds Kallet. "Asking critical thinking questions encourages others to think and empowers their ownership of issues and solutions and raises their confidence in themselves."

Mind the gaps

As more organizations embrace coaching culture, there are some missteps that can delay or cancel out the desired outcomes of a positive coaching relationship. Many companies still cling to the belief that management competencies and skills are more important for leaders to possess than high emotional intelligence—despite an array of research that says otherwise.

Additional findings from the Brandon Hall study support that thought: More than half of respondents said that they don't sufficiently focus on foundational leadership skills such as emotional intelligence. As Brannigan points out, coaches will benefit from tapping into soft skills and trying approaches other than the ones they're used to.

"Most leaders, particularly as they become more senior, have preferred methods for executing tasks and making decisions. Hence, in coaching others, leaders can find it challenging to stay open to new approaches and perspectives of the mentee rather than jumping in with one's own solutions," she explains. "Additionally, whilst business can be dominated by rational logic, a lot of what really helps a mentee succeed is unpacking emotions and feelings, which can be a gap or difficult conversation category for many leaders."

Measure the impact

Demonstrating a direct correlation between a successful coaching culture and a company's bottom line remains a challenge and can be hard to illustrate. The Brandon Hall study found that the majority of organizations—regardless of size—have no way to demonstrate that their leadership programs have significant impact on business results. However, leaders say many unquantifiable metrics that result from a coaching culture can indeed bring success to an organization.

A key benefit of a coaching culture is a stronger, critical thinking workforce. "While the coaching portion of leadership requires time and effort, ultimately a stronger employee and leader is the result," says Conte. "The success of the coaching is based upon the output. Were the results delivered on time and accurately? As a leader/coach, did your time involvement decrease? If yes, then time and effort was justified."

Another factor to keep tabs on is the quality and quantity of feedback. Brannigan says that Culture Amp encourages organizations to measure their coaching culture through the amount and quality of given feedback, with a goal to increase both over time.

"I would strongly encourage leaders to put in place technology, which enables people in their business to give peer-to-peer feedback," she notes. "Starting here means that it becomes part of the norm and isn't something saved up as a torrent of feedback once a year during the annual appraisal cycle."

Leaders also say that a coaching culture can result in increased organizational performance and an uptick in engagement driven by having new leaders at the table. "You have to view coaching as a leveraged investment. It takes time, it takes energy, and things can initially go faster if you just tell people what to do," Kallet explains. "But a coach is a teacher, not only about the subject matter, but a teacher regarding how to look at issues, problems, goals, situations in a way so that people learn to do that themselves."

In the end, Kallet notes, everyone learns coaching skills and how to solve challenges on their own.

Great leadership is something that many people have grown a greater appreciation for, and coaching is a way for top leadership to play an active role in developing other leaders. The organizations that will thrive moving forward are those that understand that not all leaders are born; many are coached. And as noted in the Brandon Hall study, when coaching and mentoring exist at all levels, the leadership culture can be transformative.

Derrick Thompson is a writer/editor for ATD; dthompson@td.org.

Take Control of Your Work

Improve productivity by better managing the way you get work done.

BY MAURA NEVEL THOMAS

People's constant state of "busyness" has a detrimental impact on our ability to get important things done. In my experience, individuals are rarely productive when they're feeling overwhelmed by their workload and are confused about where to start.

All too often, tech-savvy knowledge workers think a piece of new technology or a new app will help calm the chaos and better organize their lives. But without a system in place to apply the technology, it often falls flat and is quickly forgotten. Just like professional-level clubs won't automatically turn an amateur golfer into a professional, neither will a new app or software on its own turn you into a productivity pro. To take control of your workload, you need time, space, and the right tools—but most importantly, a workflow methodology.

A method to the madness

Simply put, workflow management offers busy professionals the ability to systematize the way they get work done. It's the system that keeps those new tools from falling flat and being forgotten. And while *workflow* is a term that may be more familiar, the term *life-flow* may be more appropriate, because the system works for all parts of your life—both professional and personal.

A workflow management system is not an app or a piece of software. Instead, it is a way to operate—a way to corral into one place all the important details about everything you need or want to get done. It provides you with a centralized approach for storing, organizing, prioritizing, and acting on tasks and responsibilities. Having a workflow methodology enables you to be more in control of your attention, time, and energy.

Why is a workflow management system important?

Without a workflow methodology, it's difficult for people to know the best use of their time at any moment and, therefore, to focus and make progress on the high-level work that really matters. Consider whether this seems familiar to you: My clients tell me that their typical state at work is scattered, distracted, and feeling constantly behind. And when they do have a spare moment to tackle a task, they often don't know where to start, so

4 Ways to Gauge Your Need for Workflow Management

1. How much control do you exert over your attention? Do you switch your attention every few minutes?

2. How many emails are flagged in your inbox right now? Are you distracted all day by feeling pressured to constantly check the latest incoming message?

the fastest and easiest thing becomes the default action.

Having a workflow management system in place puts you back in control of your attention and your action, so you can be more proactive than reactive. When managing work is part of a comprehensive process, it reduces the number of decisions you need to make throughout the day—which helps you avoid procrastination, inefficient writing, rewriting, and reviewing of lists and flagged emails. Likewise, it enables you to make the best use of your time at any given moment.

A good workflow management system is an interconnected collection of habits and behaviors.

What does it look like?

A good workflow management system is an interconnected collection of habits and behaviors that together add up to efficient, productive days. It encourages people to separate those things that have a strong relationship to time (an appointment tomorrow at 3 p.m.) with those things that have a weak relationship to time (no real due date or a due date at some point in the future, such as "Fill out the expense report by the end of the month" or "Call the dentist to make an appointment.")

The former tasks go on your calendar. But the latter should all be contained in a good task or project management tool, because in my experience with clients, trying to schedule everything on your calendar leads most people to frantic and continual calendar rearranging. And one list is better than several for the same reasons that it's easier to complete a jigsaw puzzle when all the pieces are on one table instead of scattered throughout the different rooms of your house.

The calendar and the task app are the tools, but the habits for using them are the workflow management system. More of these behaviors include:

- controlling technology, such as closing out email and working in offline mode to enable undistracted work time for important, thoughtful tasks
- categorizing tasks in a way that inspires action on the right work at the right time
- using airplane mode, powering off, or enabling Do Not Disturb mode on smartphones to be more proactive about where you direct attention
- practicing single-tasking to build up your ability to focus, instead of the constant multitasking most people engage in that chips away at attention span and patience

3

Is work-life balance an issue for you? Do you spend a lot of time working, or worrying about work, when you're not at work?

4

If you choose one component of workflow management and implement some of the steps, do you think it would improve your productivity?

Workflow Management's Main Components

An effective workflow management system encompasses any—or a combination—of these elements.

Attention management. The ability to manage your distractions and mental state and apply yourself fully to your highest-level work.

Action management. Skills to effectively store, organize, prioritize, and appropriately act on your responsibilities.

Communication and information management. Covers physical and electronic clutter, email management, and efficient communication strategies.

Meeting management. Addresses effective meeting planning and execution, as well as how to get results from meetings.

Behavior change management. The first step is awareness of your current habits, and the second step is the knowledge of what to do instead.

Culture change management. Your work environment likely supports or encourages your ineffective behaviors. Changing your environment, such as the occasional use of a "Do not disturb" sign on your door, your cubicle wall, or the back of your chair, can go a long way toward improving your productivity.

Advertiser Index

- habitually keeping all tasks and other responsibilities in a single tool (rather than scattered in flagged emails, paper lists, notebooks, sticky notes, and a variety of software)
- drafting tasks deliberately, with a focus on specific action, organizing them in a logical manner, and prioritizing them effectively
- being realistic and intentional with time by not overbooking with appointments and instead leaving appropriate amounts of time to be proactive, be thoughtful, and effectively deal with the work that arrives via email.

Productivity gains

Those behaviors and others add up to an effective workflow methodology, put you back in control of your work, and enable you to make more progress. Studies show that progress is an important motivator. It enables individuals to feel accomplished at the end of their day, instead of just frazzled and exhausted.

A workflow management system offers many other benefits.

It helps you get and stay organized. When you organize and store the details of your life in a logical way, you can easily access what's next and act quickly.

It keeps you proactive. When you put a workflow methodology in place, you can make better choices about how to use your time. You know what you need to get done and by when. You can prioritize what's most important in the big picture, rather than always responding to what feels urgent right now.

You minimize emergencies. By always having a visible timeline of projects and tasks you are completing and deferring, deadlines won't sneak up on you.

You advance your goals. When you see all your tasks in one place, you're better able to manage the daily actions that drive progress toward the bigger projects and goals.

It reduces procrastination and creates a clearer direction. A workflow system helps eliminate that "What should I be doing now?" feeling. You know what you need to do next and can act quickly (no more putting things off or spending your days being entirely reactive).

You'll feel in control instead of overwhelmed. When you have a system to manage all the tasks in your life, your responsibilities get easier to manage, and it becomes part of how you accomplish things and track those accomplishments. Even when you can't get everything done, you'll be able to make clear decisions about what to defer, so you can manage the consequences.

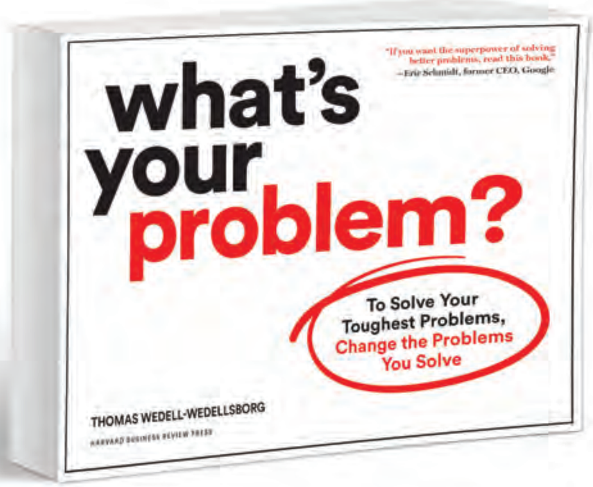
What about productivity apps?

It's not uncommon to think that a new app or tool will solve all your problems. Having challenges with time management? There's an app for that. But without a system to anchor the technology, that app can become useless.

Productivity apps function more effectively when used in the context of a workflow management system—the same way great clubs support a pro golfer's ability to win a tournament, but the same clubs in an amateur's hands don't offer the same benefit. For example, randomly making appointments with yourself to get work done doesn't give you an overview of priorities or timelines. And reading and responding to every email as it arrives doesn't allow you the thoughtful, undistracted time to do your best work.

Rapidly juggling tasks undermines your attention and your productivity by creating a habit of distraction. A workflow methodology enables you to fully harness the power of any productivity app or tool. It is a critical but often overlooked skill for busy knowledge workers to manage the demands of our modern always-on, technology-rich, communication-heavy, and distraction-filled work environments. It's a skill that's not taught in school but one that will give you a critical edge in your career.

Maura Nevel Thomas is the creator of the proprietary Empowered Productivity System, a workflow management process; maura@regainyourtime.com.



Reframe Your View for Better Solutions

What's Your Problem? To Solve Your Toughest Problems, Change the Problems You Solve

By Thomas Wedell-Wedellsborg
Harvard Business Review Press, 232 pp., $25.99

REVIEWED BY NICK ALLEN

At first glance, *What's Your Problem?* appears to be a status quo management or consultant self-help book. But after a few pages, you start to see how your initial perspective of problems isn't always accurate. The overarching theme is reframing the way we see a problem and how it can lead to radically better solutions.

Sometimes we take a problem for granted: The elevator is slow. That limits the scope of our solution space: We need to replace the motor or elevator all together. Reframing has us think about the problem from a different perspective: The wait is annoying; make it feel shorter with mirrors, music, or hand sanitizers. Additionally, reframing can reduce teams' workload from rework or focusing on the wrong problem.

As L&D folks, we often quickly jump to looking for the root cause to a problem. Wedell-Wedellsborg teaches us that "reframing is not about finding the real problem; it's about finding a better problem to solve." The benefits of reframing align with the most important skills of the future: complex problem solving, critical thinking, and creativity.

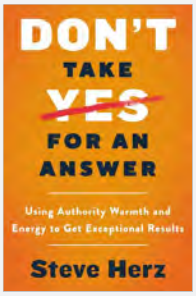
Chapter 7 helps us realize our own role in creating problems by looking in the mirror. How many times have we heard someone complain about "the system" or say, "We can't start until we know exactly what the CEO wants"? This level of thinking inspires us to relinquish and separate ourselves from the problem.

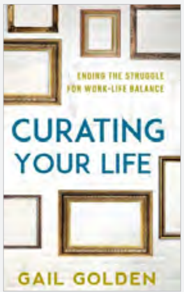
Some may describe this thinking as being jaded, but Wedell-Wedellsborg challenges us to scale down the problem and ask ourselves: Is there part of the problem I can do something about at my level? Consequently, the reflection from the mirror provides internal self-awareness and an opportunity to begin to understand how others perceive us.

From the beginning, the author challenges readers to brainstorm a professional and a personal problem to reframe using the newly discovered techniques. While reframing for the first time can lead to creating a larger list of problems, readers will begin to consider their motives and drivers. Each chapter contains definitions; real-life story examples; and point-blank, handwritten, flipchart-style diagrams.

The book's topics resonated with me, and the applications in my professional and personal life are endless. I already find myself having stakeholders define problems so I consider whether this is the right problem to solve.

Nick Allen is a learning experience designer for a global investment firm in New England; nickaeiou@outlook.com.





Don't Take Yes for an Answer
Steve Herz
Harper Business,
192 pp., $29.99

How do you reach the top? Based on more than two decades of experience, Herz says connectability is the single greatest factor. To have connectability, he points to three communication strategies: authority, warmth, and energy. Yet, he says that few people will tell someone they lack these skills.

Don't Take Yes for an Answer delves into feedback avoidance. The author advises readers to stop accepting praise and instead push for honesty and the critical assessment you need to go further in your career. He unpacks the three communication strategies, offers guidance on pinpointing the areas where you are lacking, and includes real-life examples.

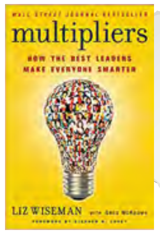
Curating Your Life: Ending the Struggle for Work-Life Balance
Gail Golden
Rowan & Littlefield,
176 pp., $30

Achieving work-life balance can be challenging. But Golden, who has 25 years of experience as a psychologist and 15 years as an executive coach, says it is possible to bring balance to your life. It's all about focusing on what is most important and meaningful and what brings you the most joy.

To perform at our best, Golden explains that we must organize our lives. She guides readers in sorting their activities into three buckets—things they won't do, things they will be mediocre at, and things that they will thrive at. Although living a curated life is not simple, she emphasizes that it's possible and will make you productive and feel good about yourself.

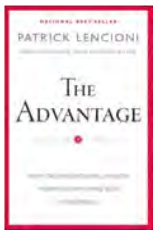
FROM OUR AUTHORS

What's on Your Bookshelf?



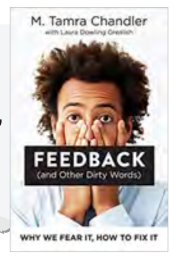
"There are bird watchers, and there are whale watchers. I'm a genius watcher."

Multipliers: How the Best Leaders Make Everyone Smarter
by Liz Wiseman, with Greg McKeown
When I think about how I want to show up as a leader to my team, I think about how I can serve as a "multiplier" who attracts, empowers, and develops talent. This book provides a solid overview of how managers empower their teams and their shadow counterparts. **—Adam Avramescu**



The Advantage: Why Organizational Health Trumps Everything Else in Business
by Patrick Lencioni
From a business strategy standpoint, nothing beats a Lencioni work. I love the actionable nature of the content created by the Table Group. This book serves to drive organizational health but can also be leveraged at a departmental level (read sales organization). If you're looking to build a cohesive leadership team and create clarity at scale, this is the book for you. **—Whitney Sieck**

"The root of feedback's branding problems lies in the way we're thinking about it and experiencing it."



Feedback (and Other Dirty Words): Why We Fear It, How to Fix It **by M. Tamra Chandler**
I needed some new insights to share with a very sophisticated group about feedback. It's something we all think we know about, and so many books have been written on the subject. I found what I needed here. This one is the best. I loved her writing style. I loved the ideas; I was able to put them to use immediately in a presentation, and I know it hit home. I loved that it was practical and yet irreverent. **—Beverly Kaye**

Facilitating Organizational Fit

Employees add to a company's culture in more ways than one.

BY RUTH MÁRQUEZ

If a company assesses for organizational fit during the interview process, then new hires will presumably well represent the company culture. In turn, organizational fit implies increased engagement, productivity, and job satisfaction potential. Yet, while prehire assessments are increasingly standard, research consistently reveals that companies continue to face only moderate employee engagement levels. Facilitating organizational fit, rather than exclusively assessing it, results in employees feeling valued early on for more than the specific skill set for which they were hired.

What it is

Facilitating organizational fit mobilizes a company to actively support employees in finding their place at work, especially as remote work increases. It entails emphasizing strengths language and influencing employees toward use of their unique qualities and life and career experiences, whether in virtual meetings, global projects, or at headquarters.

How it works

Established team members and managers, if coached to do so, can play a key role in familiarizing a new employee with the culture during the vulnerable first months. A new hire's effort to stand out—the basis of landing the job—can cause missed cues about the culture. Facilitating fit helps that individual learn to just be "one of us," focused on achieving team goals.

Facilitating fit is about an experiential culture walkthrough rather than simply meeting the team. It is intentional guidance to move the new employee toward belonging and exploring informal roles that affirm positive qualities.

In this approach, professional development as it pertains to organizational fit is a shared responsibility rather than being a task solely for the talent development function or a presumed byproduct of algorithmic prehire screening.

Included in myriad new roles for us as TD professionals is influencing how companies help talented employees discover or rediscover their potential and value and enable future contributions. It is within our purview to help employees understand their fit just as much as it is their responsibility to communicate it, especially in a workplace with decreasing face-to-face interactions.

Guidelines

Consider the following strategies to help move the needle of organizational fit in a positive direction.

Onboarding with a twist. After official onboarding, encourage managers to remain active in evaluating a new or reassigned employee's progress in acclimating. A formal process entails the manager and employee

CHECKLIST

Familiarizing New Employees With the Company

Engage managers in conversations about their vital role in fit-check activities for their new employees.

meeting at approximately two-week intervals with one to three questions pertaining to fit, not performance.

Managers can formulate the questions with input from a TD professional and the new team member's colleagues, along with their own observations of employees who smoothly navigated their first 90 days. The ultimate goal is to foster employees' experience of value to the organization that isn't based solely on performance.

Tips: Doing a trial run of this extra onboarding with a cohort of new hires will render excellent feedback. If you work in a small firm, offer to join the conversation between the manager and new hire with a timeline and question samples. You may even offer to conduct every other meeting without the manager present so that new hires can share their thoughts with different staff during the most formative phase of their onboarding. Managers will likely appreciate structure and assistance to help the team start off well.

A different kind of team talk. Teams will not automatically get along simply because they share the same work area. Colleagues won't necessarily ask the new employee the right questions, listen to understand, or gauge how the new member is developing their fit potential. Likewise, not all social types will be comfortable jumping into sharing during team meetings. On the other hand, introducing team-building activities acknowledges there is now a new team that needs to learn how to work together. Managers' efforts to facilitate these activities during a team meeting, however, may yield mixed results because the new team member won't be certain what or how much to share.

Tips: You can be a safe and objective facilitator who can lead everyone, the boss included, in team dynamics. Pull from a variety of tools, conversation starters, and meaningful paired activities designed to establish a safe level of familiarity during the first few weeks—before assumptions about one another are set.

How are we doing? Have a conversation with the new team member to learn how the organization is doing in making that individual part of the team. The quality of feedback will hinge on meaningful questions, and the quality of communication will depend on skilled listening. Whether the new team member is a new hire or a reassigned employee, being heard is a powerfully affirming experience.

Tips: Focused, post-hiring conversations provide excellent indicators of expectation conveyed in interviews as well any support needed to enhance the employee's organizational and role fit. These conversations can provide a safe place for new hires to confirm or negate assumptions about the organization.

Results

Research on the top reasons talented workers leave their jobs consistently reveals people-influenced factors. Employees desire to be heard and valued. Those are the factors that facilitate—not just anticipate—the organizational fit that results in retention of skilled workers, with or without a formal fit assessment. The ideas presented here largely promote interest and listening, the often-overlooked work necessities that are the trademarks of resilient, positive companies with loyal, engaged employees confident they belong and are valued.

Ruth Márquez's talent development experience spans industries, sectors, and higher education; ruth.mw14@hotmail.com.

RESOURCES

Harter, J. 2018. "Employee Engagement on the Rise in the U.S." Gallup, August 26. https://news.gallup.com/poll/241649/employee-engagement-rise.aspx.

Kane, H. 2018. "Strengths-Based HPI: A Win-Win for All." *TD at Work.* Alexandria, VA: ATD Press.

Shellenbarger, S. 2019. "The Dangers of Hiring for Cultural Fit." *Wall Street Journal*, September 23. www.wsj.com/articles/the-dangers-of-hiring-for-cultural-fit-11569231000.

- Design a one-pager with descriptions of scheduled conversations, with suggestions for timing—for example, week 3 and week 7.
- Introduce awareness about how each new member results in a new team. An organizational announcement can affirm the value of fit-check conversations.
- Collaboratively brainstorm with employees across departments and at different reporting levels about what would have helped them fit in faster when they were a new employee.

5 Ways to Hone Customer Service Skills

During times of uncertainty, sharp customer service skills—especially empathy and compassion—become even more important. Exhibit these behaviors in your interactions with customers, clients, and colleagues.

1 **Start with positivity.** An earnest greeting sets the tone for the rest of the communication. A friendly voice can be a comfort.

2 **Show compassion.** Recognize the increased potential for people to be worried in these stressful times and add a touch more kindness to your interactions.

3 **Determine what you can do instead of what you can't.** Avoid saying "I can't" and "It's not my job" or dismissing clients by words or actions.

4 **Ask probing questions to get to the real problem.** Query customers in a way that lets them know that you really want to hear what they have to say—and have the patience to listen.

5 **Establish relationships.** Simple ways to open dialogue are to ask whether the client had any trouble reaching you or has had a good experience with your company.

IMAGE | ADOBE STOCK

SOURCE: MAXINE KAMIN, PRESIDENT, TOUCH CONSULTING