

Chapter two



The training function and organizational strategy

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Introduction

By the end of this chapter you will be able to:

- Define and write a mission statement and key result areas for your training department
- Describe the purpose of your job and use the 80/20 rule to list the key result areas for yourself and key members of your team
- Recognize effectively worded objectives and write sample SMARTER objectives for yourself and your training team

Mission and key areas



Mission

No job exists in a vacuum. All organizations exist to achieve a purpose. The purpose may be complex and involve things that are in conflict with one another, e.g. giving service whilst being cost-effective and maintaining quality or safety standards.

The overall purpose of an organization can usefully be stated in a short paragraph, called the Mission Statement. For example:

‘To provide building maintenance services for government buildings which satisfy client needs at lower cost and with minimal disruption, whilst meeting all regulations and agreed standards of workmanship/safety; and, in so doing, achieve budgeted revenue and profit targets.’

We should know the mission of our overall organization. Failure to do so means wasted time and effort.



Activity point

Do you know your organization’s mission statement? Write it in the space provided

Mission statement – 1



The classic shape of many organizations is similar to a hierarchy. Each division should contribute to the overall aims of the organization. Within each division every department and section should contribute to the overall aims. They should clearly be able to identify how their own departmental mission statement fits into that of the overall organization.

Example training department mission statement:

‘To provide a training and consultancy service for the organization’s profit centres which provides a value for money service that fully satisfies the clients needs for quality at the lowest cost, whilst meeting our forecast budget targets.’



Activity point

Identify your training department’s purpose. If you already have an agreed mission statement write it in the space provided.

Our training department’s mission statement

If you haven’t yet developed a mission statement then now is a good time. Treat the entry above as a first draft and circulate it to some of the key players within your organization.

Lead a critical review of what’s on offer before jointly deciding on the most appropriate form of wording for your training department.

**Our training department’s mission statement
– fully agreed version: Mission statement – 2**

Identifying the Key Result Areas

The mission statement is a broad-brush approach that states in general terms what you are setting out to do in your training department. We next need to identify how you can achieve it. This will involve performing well in certain key areas. A Key Result Area (KRA) is one where performance has a critical effect on achieving the mission statement.

Your training section may well be asked to perform a wide variety of different tasks but the KRAs are the ones on which you are judged. Achieve or surpass them and you are considered a success. Fall short and you are deemed a failure. KRAs must emphasize outputs, not inputs. An activity is not a KRA just because we 'do a lot of it' (e.g. attending meetings) but because it has a major influence on the achievement of our department's main aims.



Activity point

To identify your training departments KRAs we suggest you review the following steps:

Step one

Write down all the tasks that you and your team currently undertake. Don't worry about any order at this stage, simply note them down.

Step two

Stand back and review the list. Ask yourself the question 'Does this activity contribute towards us achieving the overall purpose of our training department (Mission statement 2) and the whole organization (Mission statement 1)?' Delete any items that don't make that contribution.

Step three

Write a list of the KRAs for your section. Many large organizations may have ten or more, smaller units will usually have between six and eight.

The following example provides an illustration of a typical training departments KRAs.

Key result areas of a typical training department

1. Provide guidelines on commissioning external training.
2. Maintain a database of approved training providers.
3. Set up and manage the core internal training programme.
4. Draft memos for senior management on the training and development implications of organisation-wide policy initiatives.
5. Devise and develop measures for evaluating the quality of training.
6. Publish a monthly report on the take-up of training against budget for each division in the organization.
7. Provide a hot-line telephone support service for managers involved in local training initiatives.
8. Ensure the organization achieves the 'Investors in People' standard by the end of this financial year.



Activity point

List below those activities that make a real impact to the overall success of your training department and the organization:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Establishing personal objectives

Having established the key areas for performance of your training department your next task is to establish personal objectives for everyone in your training team.

Any organization is only as good as the sum of its parts. Just as each department should know where it fits in to the wider picture then ever team member should have a clear focus on the purpose of their job. If each person in your training team knows what they have to achieve then there is a much better chance that the organization as a whole will achieve the results that are expected.

“If you don’t know where you are going you will probably end up somewhere else!”

Robert Mager, *Preparing Objectives for Programmed Instruction*, 1962.

What am I here for?

Focusing for success

The first stage in the process of establishing their purpose is that they need to be able to give the answer to the question ‘What am I here for?’

They should be able to express, in one or two sentences, why their job exists and what distinct contribution it makes to enable the organization to achieve its purpose. Tell them to think of their job as an important piece in the organizational jigsaw. The purpose will provide the answer to both the questions ‘What?’ and ‘So what?’ Following is an example of the job purpose of a management trainer:

Job purpose: Management trainer

‘To run profitable training courses which give participants the opportunity to develop the knowledge skills and attitudes which will enable them to be more effective in achieving their work goals.’



A

Action point

Use the space below to write either your own job purpose or that of one of your key members of staff. You should aim for a summary of between 15 and 30 words.

Job title: _____

Job purpose: _____

Make sure that not only are the statements clear and unambiguous, but that they also show the ‘why’, behind their job.

It is quite common for people to express their job in terms of ‘inputs’ – the type and amount of resources used to produce work – but the reason we are employed is better measured by our ‘outputs’ – the amount of work produced, our end result.

Keep asking the questions: ‘So what?’, ‘In order to achieve what?’, ‘What will the end result be?’ – until you have a clear focus on what the chosen job contributes to the overall purpose of the organization as indicated in the mission statement.

Now we know where they are going we can assist them by providing a focus for their efforts and resources to achieving this aim.

What are your key activities?

In order to achieve your purpose you need to manage yourself efficiently and effectively. Not all the activities you carry out in a job have an equal effect on achieving that purpose. Each individual job holder needs to focus on their Key Result Areas (KRAs). Each KRA is an important part of the job that makes a significant impact on achieving its overall purpose.

One way of identifying these is by applying the 80/20 rule, which proposes that 80% of our results can generally be attributed to 20% of our efforts. This is sometimes called the Pareto Principle after the Italian economist Vilfredo Pareto, who observed that 80% of income in Italy was received by 20% of the Italian population.

The assumption is that most of the results in any situation are determined by a small number of actions:

- 80% of sales come from 20% of your customers
- 80% of sales (and profits) come from 20% of your products
- 80% of your production volume is for 20% of your product models
- 80% of your problems are from 20% of your customers, products, processes, etc
- 80% of a typical charity's revenue will come from 20% of its donors
- 20% of books account for 80% of the loans in a library
- 80% of expected results will come from 20% of the total effort

In other words, your critical 80% is the segment that contains the vast majority of what you seek.



Action point

Examples of the 80/20 rule that apply in our business are:

1. _____
2. _____
3. _____
4. _____
5. _____

KRAs should cover the main features of the job and are relatively stable over time. They should line up with the overall purpose of the organization and those of the training department. Failure on their part would adversely affect the overall team performance. The main areas should be defined in broad terms.

It is normally possible to identify between five and eight main areas of responsibility where they will make a significant contribution to the overall priorities agreed by their training manager.

If the number of KRAs moves into double figures the range of main responsibilities is too high. It will become difficult for the job holder to establish priorities in dealing with their time and achieving what may often be conflicting objectives.

In our next example we provide some details of typical KRAs of a management trainer.



KRAs of a management trainer

- Deliver effective training events which improve the management skills and knowledge of all the participants.
- Research and design new courses and ensure they are commercially viable.
- Update existing materials to ensure they are accurate, credible and continue to meet the needs of the organization.
- Carry out training needs analyses and evaluate courses to ensure they meet business needs.
- Manage the training office support staff to ensure events are effectively administered, fully equipped, run on time and meet budgeted financial targets.
- Market the services of the training department to internal and external customers to secure new and repeat business.



Activity point

Use the space below to rate a job of your choice and identify their KRAs. We are not after a full, detailed job description. This is simply a structured approach to help you both identify the priorities in their jobs for the year ahead.

Job title: _____

KRAs

1. _____
2. _____
3. _____
4. _____

Performance standards and objectives

5. _____

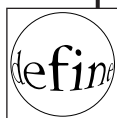
6. _____

The next step involves deciding what the job holder needs to achieve in each key area. They need to ask the question, 'How will I be able to measure that I am being successful in my job?'

What you are after are observable or quantifiable results that relate the impact of the activity to the overall purpose of their job.

Performance standards are about:

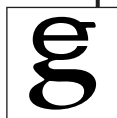
- The quantity of output a job holder has to produce.
- The quality of the desired outcome or the way tasks were achieved.
- The deadlines by which you have to produce the desired outcome.
- The cost of achieving the outcome, e.g. the budget that you have to work within.



What is an objective?

A popular definition of an objective is:

'A specific end result to be achieved within a stated timeframe to a pre-determined level of quality and quantity.'



With this definition in mind review this example typical objective:

'Reduce the delay in the submission of management reports and minutes of cost control meetings.'

You can probably see this example is:

- Too vague
- Woolly
- Not specific
- Provides no timeframe for the activity
- Difficult for the training manager or job holder to measure success.

Now look at our redraft:

‘Ensure that all departmental managers on the circulation list receive their management reports by the 21st of each month and minutes of cost control meetings are distributed within 3 days of each meeting.’

Our restatement should:

- Give a clear sense of direction for the job holder
- Focus their attention
- Provide clarity about the task to be carried out
- Provide a standard for measuring progress
- Aid their time management and prioritizing
- Give a basis for planning action.

How are objectives set?

The key factors to take into consideration when setting objectives with individuals in your training team are:

- What needs to be achieved (in the next 12 months)?
- What is it reasonable to expect from this particular job holder (take into consideration their length of service, experience, training, qualifications etc)?
- How can we improve our procedures or working methods?
- What action can we take to overcome aspects of the work which perennially cause difficulties?
- How can we express these as specific objectives?

What are the properties of an effective objective?

Effective objectives should have the following properties – summed up in our SMARTER mnemonic:

S – Specific

Clear and unambiguous end product. The individual must know precisely what they have to do to achieve the objective.

M – Measurable

Observable outcomes of performance (quantity, quality, cost, time). Where quality is the only real factor assessability may be more relevant than measurability.

A – Achievable

Whilst they should be challenging and encourage growth they need to take into account the individuals experience, capabilities and normal working hours.

R – Relevant

Address a significant need of the organization. They should be essential for the overall improvement of the department and the individual.

T – Timebound

You have agreed timescales or turnaround times for completion. Now is an opportune time to undertake the project.

E – Exciting

Project will stimulate action. This may be difficult with routine tasks, so what will motivate them to do a good job?

R – Recorded

Written down for clarity, communication and review. You will both benefit from having as audit trail of what has been agreed.

We have provided an example of an objective for a training administrator.

**Training administrator: Objective and performance standards****Objective one**

To assist the training manager run efficient and cost conscious training courses by ensuring that for each training event:

- Every participant has all the relevant call-up papers at least one week before the course begins.
- The training room and facilities are prepared 1 hour before the event and are maintained to an acceptable standard during the event for both the tutor and participants.

- The caterers have been informed of requirements in writing 24 hours in advance.
- Records of courses (attendance list, participants evaluation forms and tutors summary sheets etc) are accurate and up to date and are passed to the training manager within two days of the course closure.
- Invoices for participants and from consultants and caterers are correct and are passed for payment within two days of receipt.



Activity point

Write a personal objective.

Here is your opportunity to draft a sample objective and standards of performance for a member of your training team:

Team member: _____

Objective: _____

Performance standards:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

What you have constructed is a blueprint for effective management. By identifying what they should be doing and how, both you and the job holder will recognize if they are off track. Members of your training team can now focus their efforts on making sure they are managing their resources efficiently and effectively to achieve the desired results.

Checklist



The underlying principles of this chapter are that:

- ✓ A manager's primary function is to plan, organize and control staff and other resources in order to achieve results.
- ✓ Whether or not there is a formal objective setting system in their organization training managers should produce objectives for their own area of responsibility.
- ✓ These objectives should relate to the priorities identified by the organization as a whole and reflect the commitment made in its mission statement.
- ✓ In any job there are a few key areas of work where good performance is required to make the maximum contribution to both team and the organization's success.
- ✓ If all are to work effectively to achieve the team and organization purpose it is essential you know exactly what level of performance you are aiming for – your objectives and standards.
- ✓ Effective objectives comply with our SMARTER format.