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From Graduation Day to Independence Day

HOW DO YOU GET a large number of employees up-to-speed quickly? The answer to that question has been the focus of our work over the past two decades and has led to the discovery and evolution of the concept of Learning Paths, a different way of looking at training.

Costly Delay

Imagine that you're now in charge of a five-hundred-person call center that largely focuses on customer service. Since this is a very typical call center, you probably have at least 50 percent attrition and you're likely to be expanding and even adding new locations. This means that you will need to be continually hiring and training two hundred to three hundred new employees each and every year.

From Day One until Proficiency, which means when each new employee is fully up-to-speed, there is a high cost of errors and lower productivity and a risk of alienating customers. It's fairly intuitive that it costs more if it takes an extra six months for a new employee to get up-to-speed. However, it's even more apparent when you actually quantify and measure that difference. In this book, we will be showing you how to do this type of measurement and also how to document bottom-line results from Learning Paths.

Today in our typical customer service call center a new class of thirty employees starts every month. They go through a two-day orientation, followed by three weeks of classroom training. Those who successfully make it through training and pass all the tests spend the next thirty days nested or buddying up with a lead or top performer. It's a period of probation with a lot of one-on-one coaching.

If you asked supervisors in the call center how long it takes a new employee to get up-to-speed, they would probably say sixty days. However, that's just the official training period. In our experience, if you actually looked at performance measures you'd find that it can take two to three times longer than the official training period for a new employee to reach the level of an average performer.

Why is there such a large gap between the end of training and reaching the level of an average performer? We've uncovered three major reasons. First, when you have a large block of up-front classroom training, you usually also have a large data dump that is easily forgotten. By the time Week Three rolls around, it's difficult to remember what happened on Day Three. Without direct application to the job in a real, live experience, most of what happened in the classroom will have to be repeated several more times.

Second, most of the time we underestimate the amount of practice it takes to learn a new skill. You can learn the basics of keyboarding in an afternoon, but it takes several weeks of practice to be able to type fifty words per minute. When you look at a more complex skill, such as making a sales presentation, this takes even more practice. In reality what often occurs is that most of this practice happens unsupervised and in front of customers. It's a very expensive way to learn by trail and error. And many bad habits are picked up and passed on this way. The sink-or-swim approach has many

hidden costs, where 20 percent make it and 80 percent do not. Think of the efficiencies if we can turn that around so that 80 percent make it and only 20 percent do not.

Third, once the classroom training is over, there isn't a lot of consistency or structure for the on-the-job training or coaching. Depending on who you are paired up with in our call center, the type of training you receive will be all over the map. You're even likely to get a coach who says, "Forget about what you learned in class. I'll show you how this is really done."

We've also found that when you actually dig into the formal training and look at what's being taught, you almost always find that a portion of it is out-of-date, no longer applicable, or just plain wrong. Since most training isn't continuously updated and revised, it's often one step behind. This is an issue that we are going to address strongly in this book as we go along.

Imagine now that you're in charge of an outside sales force or a manufacturing plant or even an accounting department. You have exactly the same issues of getting new employees up-to-speed and also existing employees who aren't there yet. You have the same expense of errors and lost business that comes with new employees. The only difference is that in some of the more complex jobs the actual start-up time may be as long as nine months to two years.

Independently Productive

Before we define Learning Paths, it's important to clarify what it means to be up-to-speed. One of the key terms we use is "independently productive." This is the point in time when you are left totally on your own and that you can do your job without asking questions or making mistakes. It's also the time when you feel confident and competent in your job.

In a lot of jobs that operate in a team environment, the concept of "independently productive" is particularly important because the support of the team often masks what individuals are actually contributing.

Think about the jobs and positions you've had in the past. It always took a while to learn the job, but at some point in time, you felt that you had the job mastered. As we set out specific measures for being independently

productive, we are going to do so in terms of *proficiency*. Proficiency is when a new employee achieves a predetermined level of performance on a consistent basis. Proficiency can be defined in numbers of transactions, dollars sold, defect rates, customer satisfaction scores, or anything else that is measurable and related to results. If we look at it from the customer's perspective, we might ask how long it will take to completely replace the person who has left.

So with that foundation, when we talk about getting up-to-speed or start-up time, we are going to be doing so in terms of Time to Proficiency. We know that Time to Proficiency has a dollar and cents cost to the business that grows with every extra day, week, or month. We also believe that reducing Time to Proficiency is the most significant contribution the training function can deliver to the organization.

The concept of a Learning Path is based on our belief and experience about how people actually learn. Before we describe the methodology of Learning Paths, take a look at this example and description of how people learn.

How People Really Learn

Underlying every concept and principle in this book is our firmly held belief about *how people really learn*. While much of this is very intuitive, because it's how we've all learned what we know and can do, in most organizations it seldom shows up in how training is delivered. We'll be referring to this as *the difference between a curriculum approach and a Learning Path*.

The easiest way to look at what we are talking about is through a couple of brief examples. Learning how to play golf is a great example because it requires a wide range of skills and knowledge, from analytical thinking to psychomotor skills. As we go along, we are going to contrast learning to play golf with learning how to sell.

Using the traditional method of training, let's break golf down into its component parts and structure classroom training for each. For our new golfers our three-week training program looks like Exhibit 1.1.

Exhibit 1.1. Three-Week Golf Training Program

Week 1	Week 2	Week 3
<ul style="list-style-type: none"> • Introduction to Golf • The Basics: Grip, Stance, and Ball Position • The Full Swing 	<ul style="list-style-type: none"> • Chipping and Pitching • Putting 	<ul style="list-style-type: none"> • Course Management • Specialty Shots • Tournament Play

This is very intensive training. With hard work, you might even be able to break 100 by the end of the third week. But getting to a top performer level, which means shooting in the 70s, is likely to take months or years to learn, not three weeks. The same holds true for selling. New salespeople come out of their three-week to six-week training with the basics but are usually six to nine months away from being even average performers.

So what's missing? The major difference between someone who shoots as low as the 90s and an A-level player shooting in the 70s is about 85,000 practice balls. When you consider that a large bucket of balls at a driving range has 85 balls, this will add up to about 1,000 large buckets or around one large bucket a day, every day for about three years. An elite player, either a top amateur or a tour-level player, will hit four to five million practice balls in his or her lifetime.

A few other things are missing also. There's a big difference between playing five to ten rounds of golf a year and playing seventy-five to one hundred rounds of golf annually. This also doesn't include playing in tournaments and matches. There's a lot of difference between playing with friends and playing in front of thousands of people for money.

So let's go back and look at our three-week golf curriculum. Where is all the practice and experience? It's not there. Now let's switch over to a typical sales curriculum. Consider how many sales calls it takes before you really

know how to sell. Depending on the complexity of the sale, it's probably in the hundreds. And it also involves a wide range of sales situations and challenges to achieve some level of mastery. However, you'll seldom if ever see that detail assessed and documented.

One work environment that starts to address this issue can be found in call centers. Typically, call center training starts with one to six weeks of classroom training, followed by some type of on-the-job coaching. This is usually a highly unstructured period of time—up to ninety days—where you'd work with a supervisor or top performer. While this is a step in the right direction, it's still a slow and ineffective way to learn and also falls months short of the usual six months to get up-to-speed.

Here's what really happens. We're going to assume that the training is well-built and instructionally sound. When you go through weeks of classroom or formal training, you are bombarded with all sorts of information, techniques, processes, and expert presentations. By the time you get to Week Three, you no longer remember much of what you did in Week One.

The situation gets even worse by Week Six. As you step out into the job for the first time, you're still a long way from being an average performer. What's missing is all those practice balls, or a few hundred sales calls. You have a big investment in all these new employees now, but your break-even point is still a long way away.

The major shift in the way training needs to be structured involves integrating formal training, practice, and experience along a Learning Path, and not in a topic-by-topic curriculum. In our golf analogy, learning how to putt might have the Learning Path shown in Exhibit 1.2.

As you can see, there is a lot of time spent in structured practice, which in our sales examples is all the joint calls, ride-alongs, and practice presentations. While this often happens informally, it's not as valuable or powerful as when it is integrated back into the first few weeks on the job with a great deal of structure, rigor, measurements, and feedback.

If golf or sales isn't your game, here are a couple of other examples to illustrate the point about how people really learn. Have you ever mastered playing a video game or wondered how someone got so good at playing PAC Man®?

Exhibit 1.2. Putting Learning Path

Day	What	How
1	Putting Basics	<ul style="list-style-type: none"> • 30 minutes lecture/demonstration • 60 minutes practice putting with a coach
	Short Putting (1 to 10 Feet)	<ul style="list-style-type: none"> • 30 minutes lecture/demonstration • 120 minutes short putting drills with a coach
2	Long Putting (10 to 50 feet)	<ul style="list-style-type: none"> • 30 minutes lecture/demonstration • 120 minutes long putting drills with a coach
	Reading Greens	<ul style="list-style-type: none"> • 30 minutes lecture/demonstration • 120 minutes reading greens drills with a coach
3-5	Practice Putting	<ul style="list-style-type: none"> • 500 short putts (150 uphill, 150 downhill, 200 side hill) • 500 long putts (150 uphill, 150 downhill, 200 side hill) • 3 putting tournaments

It's simple. If you spend about twenty or thirty hours playing the game, it starts to get easy. You quickly stop thinking about how the game works and start to actually play the game. Soon you will begin to see patterns and methods for how to beat the game. You plow through the frustrations and failures in the first few hours to quickly master the game. The PAC Man class might have shortened your learning time, but it can never substitute for the hours of practice.

Part of this came strongly into focus for us a few years back while working with an apprenticeship program with the State of Minnesota. They had nicely set out what was very similar to a Learning Path in order to achieve an apprenticeship certificate. They were working mostly with manufacturing jobs. What you would see was a formal training program followed by the number of hours working on a specific machine. You'd see a one-week

classroom program of working on a small printing press, followed by 2,000 hours of on-the-job experience. There might be four or five pieces of equipment followed by job experience ranging from 2,000 to 5,000 hours. It's not just practice, but people you have met, things you have done, places you have visited, tests, people you have coached and taught, other jobs you have done. All of these can go on a Learning Path.

So the question arises, if it takes 2,000 hours to learn how to run a small printing press, how many hours does it take to make a high-level, complex sales call? You'd probably have a tough time finding that number in any sales training you've ever seen.

In connecting training to how people really learn, you need to focus not just on what they need to learn but also on the practice and experience they will need to achieve a high level of performance. It's moving away from topic-by-topic curriculums to Learning Paths.

Learning Path Methodology

We are going to define a Learning Path as *the chronological series of activities, events, and experiences that goes from Day One to Proficiency*. Our goal is to accelerate the Learning Path to reduce Time to Proficiency.

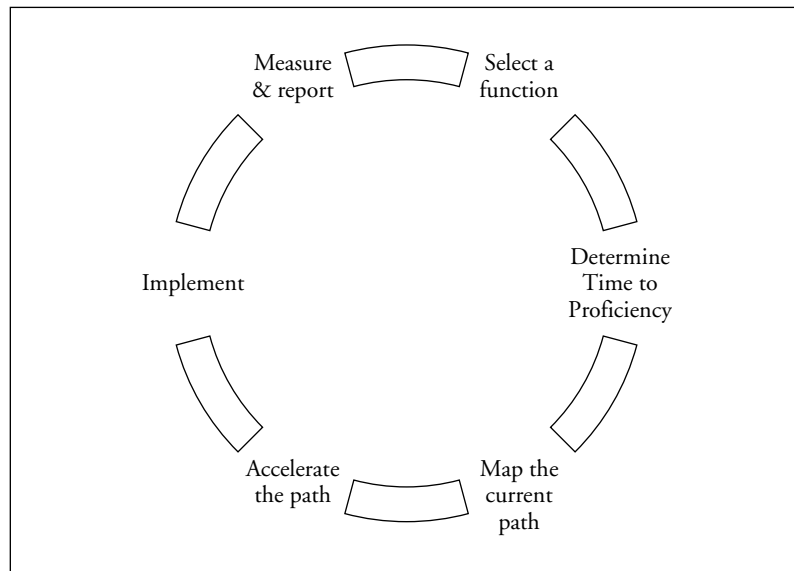
At a very high level, there are six steps in the Learning Path Methodology, as shown in Figure 1.1.

Step 1: Select a Function

The starting point is always to select a function, task, or process to work with. The first function is usually a revenue-generating function with direct customer contact. It's also a function that has an executive level sponsor or champion who will give full support.

Step 2: Determine Time to Proficiency

Time to Proficiency is the baseline measure for this initiative. All results will be measured against this amount of time. This step requires defining proficiency and then establishing a true measure of Time to Proficiency.

Figure 1.1. Learning Path Methodology

Step 3: Map Out the Current Path

This is a process of documenting everything that currently happens from Day One to Proficiency. It's not the outline of the current training program. It needs to include all of the other practice and experience that new employees currently go through. However, it's likely that you will have to build a consensus about a current path because you will find a lot of gaps and differences in how current employees actually learned their jobs.

Step 4: Accelerate the Learning Path

There are a lot of ways to accelerate a Learning Path, including using technology. In most cases, accelerating a Learning Path involves going to a more effective learning model and then rearranging or reengineering the path to fit that model.

This is also an opportunity to look at changes in the job, the business, or future strategies to make sure that the training fits both current and future needs.

Step 5: Implement the Path

Once a revised Learning Path is in place, the next step is to implement the path. This means making a smooth transition from the old path to the new one. In addition, it also includes putting in place a maintenance plan to make sure the path is always current and correct.

Step 6: Measure and Report

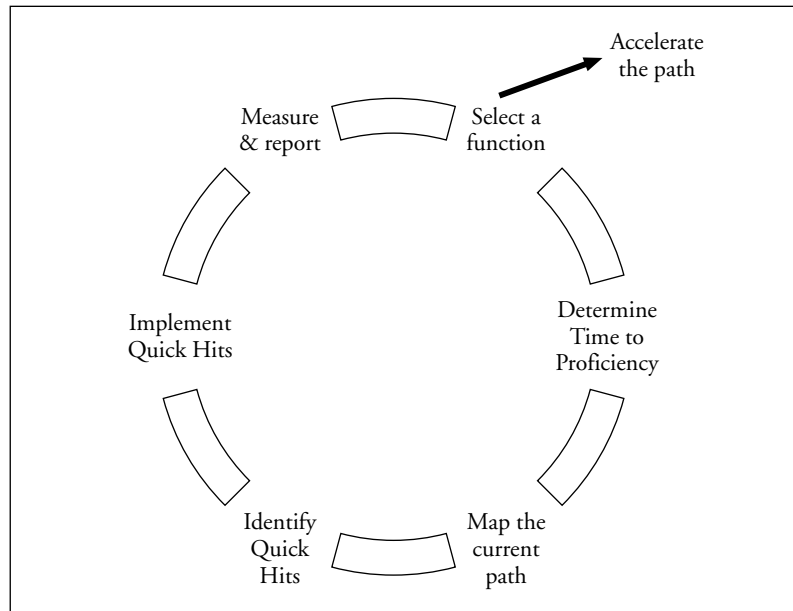
The final step involves measuring Time to Proficiency as it is reduced and then reporting results to management. This level of measurement and reporting gains support for building Learning Paths for other functions and continuing the initiative.

The 30/30 Plan

When we actually work on Learning Paths, we don't go through the entire process in a single pass. Instead, we use the first thirty days to generate some significant and early results to build support and momentum. We call this first pass the 30/30 Plan. This means we will be identifying ways to reduce the current Learning Path by 30 percent in the first thirty days. What this means is that there will be a new Learning Path in place that is 30 percent shorter and is ready to implement.

The big difference between the full model and the 30/30 Plan (as shown in Figure 1.2) is a change in Step 4, Accelerate the Learning Path. At this point, we will be looking for what we call "Quick Hits" instead. What tends to happen when you map out a Learning Path for the first time is that there are obvious improvements that can be made or Quick Hits.

The biggest gain always comes from the fact that you put new employees through a structured path that continued once up-front training stopped. For example, we did some work with a large company that had branch offices in all fifty states. Typically, there was some up-front training for new assistant branch managers. However, they picked up most of their training from others in the office when time was available. They learned how to enter a new

Figure 1.2. 30/30 Plan

order by watching someone else take an order. This is your basic over-the-shoulder training method.

What the formal Learning Path did was identify everything a new assistant branch manager needed to know how to do and plot it all on a time line. We also organized it in a way that sequenced how the job can be learned the quickest. We revised existing training materials so that they could be used as self-study just prior to a manager showing how to do a task. For example, the student would read about doing a cash transaction immediately before being shown how to do one. The reading material then served as a reference guide.

When we measured the length of time it took to develop a new assistant manager, we found it was reduced from anywhere from twelve to eighteen months to around six months. In many respects, what we did was remove most of the waiting time.

The second place you will often find immediate gains comes from eliminating the need to have a full class before you start training. When we've worked with larger sales forces we see this situation all the time. The practice is to hire salespeople and then have them come to the home office for three weeks of training when there are enough new hires to warrant a class. Filling that time until the first class was a lot of paperwork, riding around on calls, and reading through a lot of product literature. This waiting time could take anywhere from three to six weeks.

The change that was made was to create a Learning Path that structured the waiting time so that it created extensive prework for the classroom training. As a result, all new employees entered the classroom training with a similar level of knowledge and experience and then the classroom training was more focused on practice and application. We were able to reduce the classroom time by a full week. In addition, sales managers stated that the salespeople were much better prepared to make calls once they left training.

The third and perhaps most obvious place to reduce the Learning Path is to cut out everything that isn't necessary. We did some international work where new employees needed to have a basic background in American history and culture. After looking at what was being taught, it was very obvious that there were a number of wasted days spent covering information that most Americans wouldn't know or care about.

In another instance, we worked with an insurance company in their transaction processing and found that two of the processes being taught in the training actually no longer existed. Those elements were removed and training was quickly reduced by a day or two.

These are just a few examples of many. If you take the time to lay out a Learning Path for any function, you will easily see immediate gains. Most will be very obvious. The 30/30 Plan gets you through the first version of your Learning Path and will provide you with the results needed to make the case for continuing to upgrade and revise the Learning Path.

Now let's look at the first thirty days. This plan starts once you've selected a function to work on and scheduled a kickoff meeting with the team that

will be working on this function. It's critical to pick a function with a business or functional leader who will be

- A champion for the Learning Path
- Committed to the methodology
- Convinced about its value
- Respected by most senior leadership
- A thought leader respected by peers and juniors

A sample project plan is shown in Exhibit 1.3.

Exhibit 1.3. Sample 30/30 Project Plan

Day	Actions
1	<ul style="list-style-type: none"> • Hold a kickoff meeting <ul style="list-style-type: none"> - Define proficiency - Develop measurement plan - Develop research plan
2 - 7	<ul style="list-style-type: none"> • Gather measurement data • Conduct research
8	<ul style="list-style-type: none"> • Map out current Learning Path
9 - 10	<ul style="list-style-type: none"> • Brainstorm Quick Hits
11 - 13	<ul style="list-style-type: none"> • Revise and validate current Learning Path
14 - 27	<ul style="list-style-type: none"> • Build additional materials such as job aids and reference guides (These may take longer but they are added as they are ready)
27 - 29	<ul style="list-style-type: none"> • Conduct training for coaches
30	<ul style="list-style-type: none"> • Replace current training plans with the Learning Path

At the end of the first thirty days, you will most likely need to make a report of what you've been able to accomplish. Figures 1.3 through 1.5 are quick examples of that type of report.

Figure 1.3 is a quick recap of what you've accomplished to date. It's good to remind everyone that you've really accomplished a lot.

Figure 1.4 presents the definition of proficiency that will serve as the basic line for all future measures.

Figure 1.5 is a quick recap of the measurement to date. The first column shows that the existing training program lasts three weeks. When surveyed, everyone thought that it takes six weeks to become proficient. That was after an initial three-week probationary period. When time to proficiency was actually measured, it turned out to be ten weeks. The new Learning Path, which will start with the next group of new employees, is structured to last seven weeks. That 30 percent reduction was created by applying all the Quick Hits, including adding more on-the-job coaching.

Figure 1.3. 30-Day Results

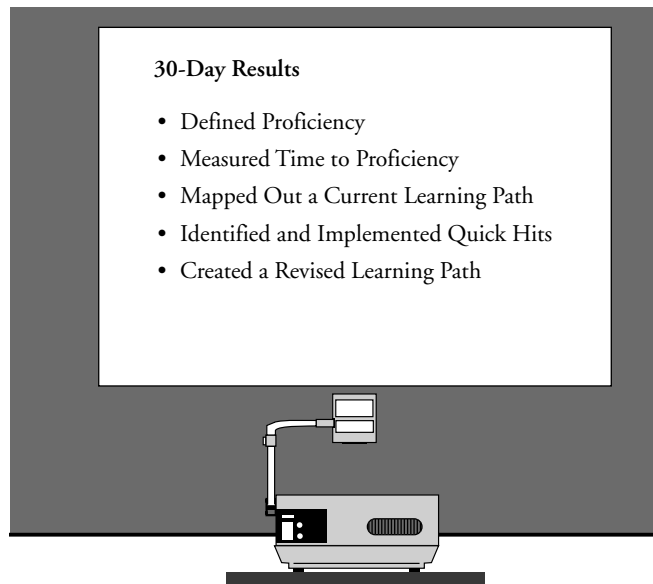


Figure 1.4. Definition of Proficiency

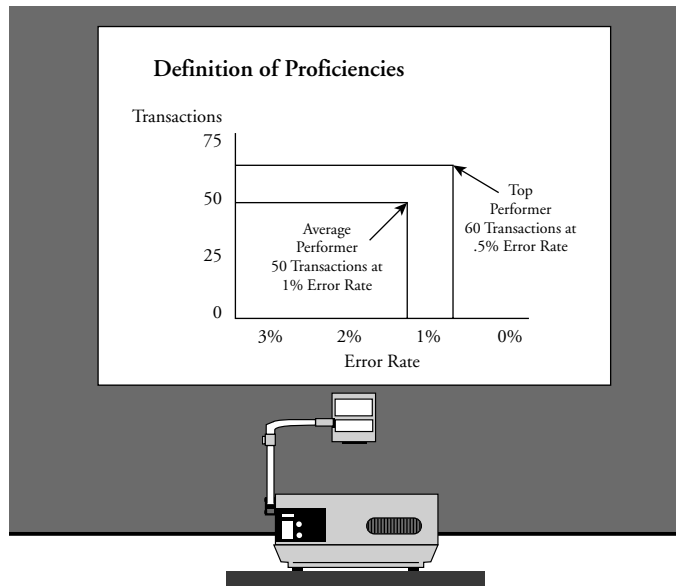
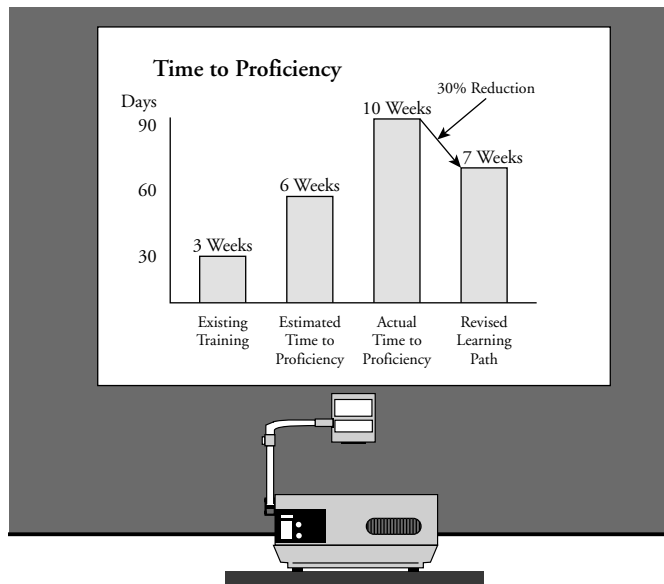


Figure 1.5 Time to Proficiency



Summary

In this chapter, we defined Learning Paths and set out the overall Learning Path Methodology. We also contrasted Learning Paths with a traditional training curriculum and presented the difference between Graduation Day and Independence Day. The critical takeaways from this chapter include:

- Every day an employee is not fully up-to-speed costs the organization money in terms of lost productivity, increased errors, and often lost customers.
- Proficiency is a result of more than just formal training. It also requires extensive practice, experience, and on-the-job coaching. That's why there is a significant difference between Graduation Day and Independence Day.
- Most organizations vastly underestimate the time it takes for employees to reach proficiency. When time to proficiency is first measured it quickly becomes apparent that there are significant opportunities for improvement.

At the end of the chapter, we introduced the 30/30 Plan, a quick-start version of the Learning Path Methodology that is designed to reduce a Learning Path by 30 percent within thirty days. The 30/30 Plan is expanded and reinforced on the CD that comes with this book.

Now that we've given you a big-picture look at the Learning Path Methodology, we are going to go into the details of each step in the process of building Learning Paths.