Building an
In-House
Training Team:
An Organization–Wide Approach
to Saving Money and Time

A White Paper from Guila Muir and Associates

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Done the right way, an in-house training program can help any company grow its business, improve the morale of employees, and retain valued workers for the long term.

EXECUTIVE SUMMARY

Almost universally, corporate training budgets have been decimated. Many businesses have severely cut back their training departments – some by more than 80% – and others have eliminated them altogether (Chartered Institute of Personnel and Development, 2009).

Unfortunately, the need for training doesn’t go away when budgets do. Employees must learn faster and better than the competition to stay ahead. What’s the best way to ensure that employees still get the training they need?

In-house training programs effectively address this challenge.

With good planning, developing an in-house training program can be surprisingly straightforward. It can also cost very little. Though many organizations consider developing this kind of initiative, most leave out essential steps and the initiative fails.

This white paper addresses these issues, drawing from research and years of experience with dozens of organizations that have built successful in-house training programs. It provides the in-depth steps, checklists, and other tools organizations need to develop their own affordable in-house training.
CHALLENGE:
Organizational Training in Lean Times

The Way We Were
Corporate training has historically been the gold standard to keep employee skills competitive and increase an organization’s value in the marketplace. A massive analysis by the American Society for Training and Development (ASTD) showed that when corporations invested more in training, their stockholder value increased (Bassi, Ludwig, McMurrer, Van Buren, 2000).

A 2009 survey of Harvard Business Review subscribers found that nearly 50% identified training as the most important priority in growing their businesses (Harvard, 2009). In 2007, corporations invested nearly $60 billion in training. And until recently, they spent more than $1,000 annually to train each employee, increasing their investment every year (ASTD, 2007).

Where We Are Now
The troubled economy has changed all of that. Many businesses have severely cut back their training departments – some by more than 80% – and others have eliminated them altogether. One public sector organization in Seattle reduced its annual training budget from $60,000 to $15,000 in a single year.

Unfortunately, when budgets are slashed, the need for training doesn’t go away. Businesses must keep their employees’ skills fresh. At least one out of every four workers is employed in a job category that did not even exist 40 years ago (Rathgeber, 2009).

What’s Next?
The importance of training is clear. But how can companies stabilize and even grow their training programs during tough economic times?

Researchers at Britain’s Cranfield School of Management studied more than 1,000 companies and found that many saved money by internally developing employee skills (Perry, 2008). The Federal Aviation Agency (FAA) used an in-house training model to successfully train 144 supervisors and managers in new regulations and practices (Sappington, Roberts, Shelver, & Kim, 2003). It took Seattle Public Utilities only four months to build their own 13-module training and successfully train 225 participants (Case Study, this white paper).

In-house training enables organizations to save money by outsourcing fewer training programs. An in-house training program can help any company grow its business, improve employee morale, and retain valued workers for the long term — if it is done correctly (Buble & DeVito, 2009, June). The next section outlines some expensive pitfalls to avoid.
WHAT DOESN’T WORK

Top 5 Money Wasters

What is the most cost-effective and relevant way to train employees? Many organizations try at least one of five common tactics that waste more money than they save.

#1 Send individuals out to public workshops advertised by national companies.

Though some of the information is valuable, the workshops are generic. Typically participating are a hundred people or more, from all industries. One or two from your organization who attend may benefit, but the value to your company may end there.

Also, can you afford to send even a single participant to an off-site training opportunity? The Harvard Business Review reports that nearly 70% of the companies surveyed significantly reduced their travel budgets in the last six months (Harvard, 2009).

#2 Bring in training experts on certain topics.

Though bringing in experts is sometimes necessary, it is becoming a luxury for many organizations. Experts may provide a one-size-fits-all training. What happens if you can’t find an expert in your specific subject area, or training tailored to your unique situation?

#3 Hire an experienced outside consultant to develop training.

Expert instructional designers often charge $100 an hour or more to develop customized training. Though estimates vary, the industry-accepted average ratio of development time to classroom time is 34:1 (Chapman, 2007). Developing a two-hour training session can cost much more than your budget allows.

#4 Buy off-the-shelf training materials and curricula from vendors and attempt to deliver it on your own.

Off-the-shelf materials, no matter the quality, are often difficult to customize to real situations. It can take hours to learn the content, and hours more to perfect the training. Often, the impact of the initial training is lost as you try to “make it your own.”
Top 5 Money Wasters

#5 Depend on unprepared staff to deliver training.

Training is not intuitive. People may know their subject matter, but that does not mean they know how to train others.

William J. Rothwell
(Donovan-Wright, 2002)

Though your staff may possess content expertise, often they lack the confidence and know-how to design an effective educational experience for others. You may get a lecture, or at best a PowerPoint presentation, from staff untrained in adult education fundamentals.

There is a growing trend towards using subject matter experts (SMEs) as trainers (Chapman, 2007). But the research raises questions about their ability to teach effectively. SMEs may:

- Know nothing about appropriate adult education theory, principles and training methods.
- Resist getting involved in training, seeing this as an unwanted addition to their job descriptions.
- Be unable to communicate their expertise in a user-friendly way.
- Be so automatic at doing something that they cannot separate all the steps involved.
- Have difficulty separating the fascinating history, details, and “nice-to-know” information from what really is needed to perform the job.

The research couldn’t be clearer: Although SMEs should be part of your in-house training team, they should never be asked to transmit their expertise in a training situation without adequate preparation (Williams, 2001).
SOLUTION:  
Steps for Developing an In-House Training Program

You can use the resources you have right now to develop and expand your company’s training potential. “Home-grown” trainers help create an organizational culture of learning, innovation and responsiveness to ever-changing needs.

Steps to Success

1. **Develop a mission statement for the project.**

Describing the value of an in-house training team will enable you to garner organizational support for the project.

First, analyze needs in the organization. Gather data that supports the need for internal training. Employees may lack critical job skills or need to build expertise in newly discovered areas to stay competitive.

Some common reasons for developing an in-house training program include:

- Saving money
- Using existing expertise
- Building employees’ leadership capacity
- Addressing unique challenges of the company or industry

Next, develop a mission statement to guide the project. One individual can develop the mission, but a small group of three to seven stakeholders is preferable. Stakeholders could include management, potential trainers and students, and subject matter experts (SMEs).

2. **Garner enthusiastic, visible support from the top.**

Identify those influential, credible leaders who are willing to advocate for the project. Use the Training Team Mission Statement to educate and excite them. When leaders clearly support trainer development, employees get the message that ongoing learning and skill enhancement is valued in their positions.

Encourage these leaders to advocate for the training team in staff meetings, company communications, and with each other. They will build support by weaving the concept and benefits of in-house training throughout the company.
3. Select people (candidates) to become “trainers in training.”

Select credible people who love learning and show interest in training others. Look for a good balance of enthusiasm, subject expertise, great communication skills, high expectations of self, and the ability to see a task to completion. These candidates form the core of your In-House Training Team.

The opportunity to learn training skills and teach others often inspires employees to join the In-House Training Team. Research shows that when employees experience personal and professional growth in their jobs, they stay longer with a company (Gaffney, 2005).

Obtain authentic support for each candidate’s involvement from his or her supervisors at this step. This support not only enables the training candidate, it helps improve organizational perceptions of the project.

4. Be clear on your expectations for In-House Training Team members.

To learn to train effectively, an individual must commit serious time and energy. Make sure you provide clear expectations for the trainer role. With the team member’s supervisor, discuss shifting some responsibilities to allow for the time required and honor the individual’s commitment to the task. Clarify expectations, time commitments, and potential rewards for participating.

5. Assign training topics.

Once you have assembled your team, assign each team member (or small group) with one topic, based on:

- Individual subject matter expertise
- Demonstrated workplace need for this information

For small groups, ensure that each group includes at least one expert in this area.
6. **Provide an expert in-house training design workshop.**

To effectively build an In-House Training Team, you must invest in trainer development. Your next step is to look outside the company for a qualified professional vendor.

An effective Training Design Workshop focuses on proven adult education principles and simplified instructional design techniques.

Avoid these pitfalls:

- “Train the Trainer” sessions offering an overview of the training function. You want practical and proven design tools, not a generic survey course.
- Sessions offering “creative training techniques.” Your team needs specific design skills and the ability to develop appropriate (and fun) learning exercises, not a selection of random activities.
- Sessions offering more “presentation skills” than training design skills. Design comes first. All the great body language in the world won’t make up for a bad training design.

A good Training Design Workshop provides your in-house trainers the skills they’ll need to continue to develop training for years.

7. **Provide follow-up design sessions if needed.**

Follow-up sessions can ensure that team members are confidently integrating their new design skills into the training they develop. Many organizations find this small-group or one-on-one consultation indispensable for creating the best training sessions possible.

8. **Reinforce classroom presentation skills.**

The focus should switch to presentation skills (often called “platform skills”) only after team members have developed draft versions of their training modules. Often, you can find resources within your own company to improve employee presentation skills.

Other free or low-cost resources may include:

- Local libraries
- Free Webinars
- Local Toastmasters groups
- University Extension programs
- Continuing or Community Education classes through local community colleges
- “Community Universities” such as Discover U, Learning Annex, etc.
- Acting or improvisation classes provided by community theaters
- Parks and Recreation Leisure Education programs
- Hiring an expert for a half-day workshop focusing solely on classroom delivery skills

The key to training design is structuring information in ways that novices can learn it.

William J. Rothwell
9. **Schedule deliveries.**

Even before the modules are totally completed, schedule a few trainings and get trainers to commit to specific dates. This helps ensure that momentum is maintained. When scheduling, consider the organization’s budget cycle and busy seasons, the trainers’ workloads and individual schedules, other training that may compete for participants, and room availability.

10. **Hold pilot training session(s).**

The training team will benefit enormously by “test-flying” the training and receiving feedback. Invitees should include stakeholders such as managers, representatives of the target audience, and SMEs.

The role of invitees should be that of a student until the conclusion of each module. After the pilot session, hold a facilitated feedback session, in which invitees shed their student role and offer input from their own point of view and expertise.

The pilot session also serves as a technical rehearsal. Use this opportunity to work out issues involving lighting, computer programs, logistics, and anything electrical. Also use it to practice transitioning smoothly from one piece of training to the next.

11. **Inaugurate the training!**

During the training, take ongoing notes on any challenges that arise. Make time to discuss these immediately after the training session or soon afterward.

12. **Provide regular trainer development meetings.**

Trainer development meetings reinforce and stabilize training skills and enhance a sense of teamwork. Members of the training team meet to discuss what is working well and to debrief issues and challenges. Often, a different trainer will model a “chunk” of curriculum or an activity at each meeting, usually once a month.
CONCLUSION

This white paper has shown that building an In-House Training Team benefits organizations in the following ways:

It’s cost-effective.
Training takes place at your location and with your own trainers. Based on your decisions, the Training Design Workshop could be the only expense.

It’s flexible.
You can schedule the development of the training team around your business’s timetable.

It targets the unique needs of your business.
The training is relevant and practical.

It helps create a dynamic, “can-do” organizational culture.
Building internal capacity improves employee morale.

And, done correctly, building an In-House Training Team provides the high-quality training your business needs during challenging economic times. With the smart planning steps and tools provided in this white paper, you can develop a sustainable in-house training program that will benefit your organization for many years.
### TOOL 1 Checklist for Building an In-House Training Team

<table>
<thead>
<tr>
<th>Step</th>
<th>Key Questions</th>
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| Develop mission statement for the project | Why build the team? What is its value to the organization?  
(See TOOL 2, Examples of Mission Statements) |
| Garner enthusiastic, visible support from the top | Which influential, credible organizational leaders will advocate for the project? Which leaders most value learning and capacity building? |
| Select people (candidates) to become “trainers in training” | Which employees demonstrate the right characteristics and skills?  
(See TOOL 3, Checklist for Selecting In-House Trainers) |
| Be clear on your expectations for In-House Trainers | Have you created a clear role description for In-House Trainers? Is everyone clear on how these added responsibilities benefit both the organization and members of the Training Team?  
(See TOOL 4, Job Description for In-House Trainer) |
| Assign training topics | What subject matter expertise does each team member bring? Which specific topic should be assigned to each member? |
| Provide an expert In-House Training Design Workshop | Which company can provide a practical approach to course design for adult learners? Who can enable team members to transform their subject matter expertise into effective training modules?  
(See TOOL 5, Selecting a Training Design Workshop). |
| Provide follow-up design sessions if needed | Do team members need further support as they develop their training sessions? |
| Reinforce classroom presentation skills | What is the current caliber of presentation skills on the team? Could improved presentation skills benefit training delivery? What free or low-cost options exist? |
| Schedule deliveries | When should training sessions occur? To which dates can training team members each commit? |
| Hold pilot training session(s) | Who should attend a “test flight” of the training? Who will facilitate the structured feedback process? |
| Inaugurate the training | Have we built in a feedback session after each delivery? |
| Provide regular trainer development meetings | What activities would most benefit training team members? |
1. From a large public-sector organization:

To create a common language and a foundation for using a new Project Management Methodology, so that the Department can build its internal capacity to successful deliver projects.

2. From a medium-sized manufacturing company:

Through developing an in-house training team, we will build the professional and leadership skills of selected staff. These staff will act as coaches, mentors, and trainers within our organization.

3. From the Human Resources department of a global company:

Our mission is to improve workplace performance across our company. We will do so by building a world-class in-house Human Resources training team. Members of this team will transform our individual subject matter expertise into effective training sessions and deliver these sessions wherever they are needed.

Our training topics currently include:

- payroll
- employee benefits
- recruiting
- hiring
- effective communication

We will design and deliver other sessions as called for.

4. From a medium-sized software company:

To design and deliver solutions through high-quality, in-house training.
Which characteristics help to ensure a dynamic, productive team? When recruiting Training Team members, look for these criteria in a candidate.

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<th>Check if yes</th>
<th>Candidate characteristic</th>
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<tr>
<td></td>
<td>Credible within the organization</td>
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<td></td>
<td>Interested in the process of teaching and learning</td>
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<tr>
<td></td>
<td>Expert in subject matter relevant to the In-House Training Team Mission; willing to “get back to the basics” in this area of expertise</td>
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<tr>
<td></td>
<td>Good “people person”</td>
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<td></td>
<td>Able to see a project to its end, good follow-through</td>
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<tr>
<td></td>
<td>Past experience in training, facilitating, or presenting</td>
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<tr>
<td></td>
<td>Proven organizational and time management skills</td>
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Not every candidate must possess each characteristic. For example, a design group of three could create training on a particular topic. This group could include a subject matter expert, an experienced presenter from another field, and a person with some subject matter expertise and a passion to learn about training.
In-house Trainer Addendum

(to Existing Job Description)

(Name) has been identified as possessing the skills needed to develop and present in-house training in his/her area of expertise, or that area assigned. This designation is considered a benefit and an opportunity for personal and professional growth, as well as an opportunity to contribute professionally to our organization.

Responsibilities include:

- Participating fully in all trainer development opportunities.
- Designing and presenting at least two workshops per year using the adult education principles learned through those opportunities. Audiences can include our existing and incoming staff as well as local, regional, or national conferences.
Investing in a Trainer Design Workshop is one of the most important decisions you make when building an In-House Training Team. Use these guidelines to compare and vet vendors of Training Design Workshops.

**Will the workshop teach participants to:**

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<th><strong>Yes</strong></th>
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<tr>
<td>Design a training session based on proven adult learning principles?</td>
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<tr>
<td>Create performance-based learning objectives?</td>
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<tr>
<td>Integrate a variety of active, relevant, research-based exercises to support the learning?</td>
<td>☐</td>
</tr>
<tr>
<td>Assess the learning in-class?</td>
<td>☐</td>
</tr>
<tr>
<td>Develop learning materials and aids?</td>
<td>☐</td>
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<tr>
<td>Develop strategies to promote transfer of learning back into the job?</td>
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<tr>
<td>Evaluate their participants’ learning and behavior changes after they deliver their training sessions?</td>
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**Other questions to ask:**

- Does the vendor have a proven track record in teaching novices the *application* of simplified instructional design techniques?
- Will the participants finish the workshop with a workable draft of an actual training session?
- How soon will participants be able to present what they have developed in a real training situation? (Should be relatively soon after the workshop.)
- Does the vendor model what they teach?
CASE STUDY:
Developing an in-house training team

Seattle public utilities

It took Seattle Public Utilities (SPU) only three months to build their own two-and-a-half-day, thirteen-module training. By month four, they had successfully trained 225 participants.

Clear Mission
The mission of SPU’s training program, entitled “The Path to Successful Project Delivery,” was to create a common language and a foundation for using a new Project Management Methodology, so that the Department could build its internal capacity to successful deliver projects.

The team decided to design three different training sessions. The Project Team Participant training day targeted all members of project teams; the Project Management Practitioner training day provided additional training for project managers; and the Project Management Overview presentation provided a three-hour overview to upper management and organizational leaders.

Support from the Top
The team involved upper management from the beginning. Lori Taylor, Training Team Leader, explains that an early goal was to get the endorsement from the Director of the Project Delivery Branch, the Director of the Utility Systems Management Branch, and the Director of the Project Management and Engineering Division to proceed to develop and deliver the classroom sessions. These leaders continue to enthusiastically support the initiative.

Selection of Training Team Candidates
The training team leader recruited two other expert project managers with an interest in training. The fourth team member was a trainer from Human Resources with a high level of organizational credibility. Each member accepted the invitation with enthusiasm, even knowing that the opportunity would add additional duties to their busy schedules.

Clear Expectations for the Team
The team leader continually clarified expectations for team member involvement. These expectations included time commitments, scheduling, and duties.

Assign Topics
The team leader assigned topics in collaboration with members. Each trainer agreed to individually design at least one module per training day. Many modules were co-designed.

Provide Expert Training Design Workshop
The team hired Guila Muir and Associates to deliver a three-day workshop to the training team on adult education principles and training design. Using rapid instructional design techniques, team members completed a draft version of each of the 13 assigned training modules by the end of the three-day session.
Provide Follow-Up Design Sessions
The team leader met individually with members as they developed support materials for learning activities and completed their assigned modules.

Reinforce Classroom Presentation Skills
The team asked Guila Muir and Associates to deliver a one-day Presentation Skills session. Team members practiced improved presentation skills as they delivered draft versions of modules they had designed. By doing so, they reinforced both their design and delivery skills.

Schedule Deliveries
It was important (and challenging) to get training deliveries onto the organization’s busy calendar, schedule available training rooms, and register participants. The team brought in a part-time assistant to handle these logistics.

Hold Pilot Sessions
The team delivered one pilot session per day of training. They invited 6-10 representatives of their target audiences to participate in each pilot session. Participants provided verbal and written feedback.

“It was truly amazing how the trainers accepted and integrated our feedback,” one participant said. “We actually saw how the final training improved as a result of the feedback we gave during the Pilot Sessions.”

Inaugurate the Training
During the month of January 2010, 10 sessions were delivered to 225 participants. More sessions were scheduled for the next two months that expect to reach more than 500 participants.

Provide Regular Trainer Development Meetings
At the end of each training session, the Trainers debrief and incorporate the lessons learned into the following sessions.

Quotes from class participants:
“The training created shared terms and methodology for project management at SPU.”
“The multiple active exercises kept my attention.”
“Each module had a review component to reinforce learning.”

Quote from the Training Team:
“I want to thank you for the training you gave us — both in the information you gave us and the example you set for us. It has made a huge difference in how effective ‘the Path to Successful Project Delivery’ classes are AND I believe it will have a ripple effect in how training is delivered here in SPU!”

- Lori Taylor, Training Team Leader
REFERENCES


